

## **PowerChurch Mailroom Walkthrough**

The PowerChurch Mailroom is an add-on product which allows you to process Postal address certification and Presort mailings from within PowerChurch Plus. For more information, visit [www.powerchurch.com/products/mailroom/](http://www.powerchurch.com/products/mailroom/).

This document will address some of the more frequently asked questions regarding PowerChurch Mailroom. The document is presented in two sections, CASS Assistant and Presort Assistant.

### **CASS Assistant**

CASS Certifying your Family Mailing List records helps you take advantage of higher postage discounts. Your records are compared against a national US Postal Service database and are standardized and completed with ZIP +4, Carrier Route, and Delivery Point information.

From the Utilities menu, choose CASS Postal Processing. This starts the CASS Assistant. At any time during this process, you can press the F1 key on your keyboard to bring up the context-sensitive help document.

### **CASS Assistant Walk-Through**

#### **1. Processing Options -**

Incremental Processing: Currently, PowerChurch Mailroom does not support incremental processing. All of your records are verified in the CASS processing each time through.

Dual Address Preference: In the case of an address having both street address and PO Box listed, choose which you would like to be processed. The "Position (Bottom)" option will process whichever address shows on address line two. The Postal Service will use whatever address is listed closest to the City, State & ZIP Code line. The option that you choose here will "rearrange" your addresses, if necessary, to match this format.

Missing/Invalid Unit Information: This controls whether or not "high-rise" addresses whose unit number fails the DPV (Deliver Point Validation) should be included in the Zip+4 count total on the PS-3553 form.

Review Errors: Check this box if you would like to review a list of addresses that could not be validated at the end of the process and attempt to lookup and correct the addresses. **Click Next.**

**Processing Options**  
Specify your processing options.

Incremental Processing

☒ Only records that have not been corrected with the current issue  
☐ All records

Dual Address Preference

☐ Position (Bottom)  
☐ Street  
☒ PO Box

Missing/Invalid Unit Information

If a high-rise address has a valid primary but its unit information does not confirm with DPV (unit confirmation is not required by the USPS):

☒ Leave +4 Code - record is included in ZIP+4 total on PS Form 3553  
☐ Remove +4 Code - record is not included in ZIP+4 total on PS Form 3553

Review Errors

☒ Review uncorrected addresses

Help Cancel < Back Next > Finish

2. **Formatting Options** - The settings on this screen can be left at their defaults without causing problems. Check the option box that reads "Update city, state, and/or ZIP code when possible" in the Uncorrected Addresses section. This will validate the City, State, and ZIP Code even if the address information is not correct.

**Formatting Options**  
Specify your formatting options.

Unit Information Placement

☒ On delivery address line ☐ Above delivery address line

Address Element Format

|                           |   |                            |   |
|---------------------------|---|----------------------------|---|
| Directionals:             | <input checked="" type="radio"/> Abbreviate | <input type="radio"/> Full | <input type="radio"/> Abbreviate with punctuation |
| Street Suffix:            | <input checked="" type="radio"/> Abbreviate | <input type="radio"/> Full | <input type="radio"/> Abbreviate with punctuation |
| Unit Designator:          | <input checked="" type="radio"/> Abbreviate | <input type="radio"/> Full | <input type="radio"/> Abbreviate with punctuation |
| Rural Route/Hwy Contract: | <input checked="" type="radio"/> Abbreviate | <input type="radio"/> Full | <input type="radio"/> Abbreviate with punctuation |

Casing

☒ Mixed Case ☐ UPPER CASE ☐ lower case

☒ Apply casing to business name  
☒ Apply casing to name fields

Uncorrected Addresses

☒ Update city, state, and/or ZIP code when possible

Help Cancel < Back Next > Finish

3. **Data Elements** - Skip this step, these features are not available in PowerChurch Mailroom. **Click Next.**

**CASS Agent Wizard**

**Data Elements**  
Specify the fields that you would like to update.

Additional Data

☐ Look up Line-of-Travel (LOT) number - required for some Carrier Route sorts

☐ Look up secondary elements using SuiteLink

Help Cancel < Back Next > Finish

4. **Mailer Address** - Enter the church name and address. **Click Finish.**

**CASS Agent Wizard**

**Mailer Address**  
Specify the mailer's name and address.

List Processor

Company Name: PowerChurch Software

Mailer

Name: PowerChurch Software

Address: 601 Alliance Ct

City, State, and ZIP Code: Asheville NC 28806

Help Cancel < Back Next > Finish

5. **Address Correction Progress** - This screen shows the final stats of your CASS Processing.

**Address Correction Progress**

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**Job Information**

|                        |               |                 |          |
|------------------------|---------------|-----------------|----------|
| ZIP+4 Data Files Date: | December 2007 | Elapsed Time:   | 00:00:38 |
| Total Records:         | 1,964         | Time Remaining: | 00:00:00 |
| Records Processed:     | 1,964         |                 |          |

100%

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**Statistics**

|                      |           |                     |           |
|----------------------|-----------|---------------------|-----------|
| <b>CASS:</b>         |           | <b>Record Type:</b> |           |
| ZIP+4 Coded:         | 1,854 94% | Street:             | 1,515 77% |
| eLOT Assigned:       | 0 0%      | PO Box:             | 143 7%    |
| Foreign/Errors:      | 110 6%    | Firm:               | 6 0%      |
| <b>DPV:</b>          |           | <b>High Rise:</b>   |           |
| Primary Unconfirmed: | 108 5%    | Exact:              | 129 7%    |
| Primary Confirmed:   |           | Default:            | 57 3%     |
| Valid Secondary:     | 1,775 90% | <b>Rural Route:</b> |           |
| Invalid Secondary:   | 39 2%     | Exact:              | 2 0%      |
| Missing Secondary:   | 40 2%     | Default:            | 0 0%      |
|                      |           | Gen Delivery:       | 0 0%      |

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**Report**

Address Correction (PS Form 3553)

To generate form PS-3553, which serves as proof to the Post Office that your records have been CASS certified, use the buttons at the bottom left of the screen: Preview (to view on the screen), Print (to send directly to the printer), or Save As PDF (save the report as an Acrobat PDF file).

If you chose to review errors, a screen will pop up that walks you through looking up and correcting addresses that were not able to be verified. Click the Lookup button to search for closer matches. Click the right arrow button to move on to the next address. **Click Exit** when finished.

**Review of 'CASS Records'**

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|                         |       |                |       |
|-------------------------|-------|----------------|-------|
| Original Record: 01209R |       | Suggested      |       |
| John                    | Smith | John           | Smith |
| Company                 |       | Company        |       |
| Address Line 1          |       | Address Line 1 |       |
| Address Line 2          |       | Address Line 2 |       |
| Asheville               | NC    | Asheville      | NC    |
| 28806                   |       | 28806          |       |

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**Errors**

Street name invalid

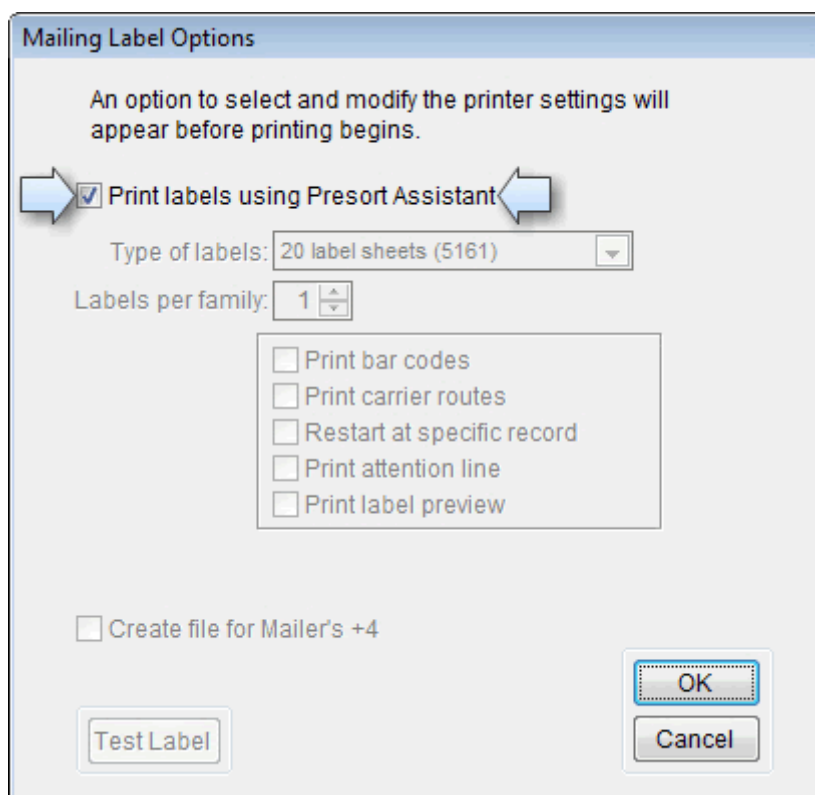
**Records to be reviewed**

1 110

☐

## **Presort Assistant**

From any of the "Print Mailing Labels" menu options in PowerChurch Plus, use the Selection Criteria screen to narrow the list of people to whom you are sending the mailing. Click OK. The next screen will have an option that reads "Print Labels Using Presort Assistant". Check this box and click OK.



This starts the Presort Assistant, which will step through the process of generating your mailing. At any time during this process, you can press the F1 key on your keyboard to bring up the context-sensitive help document.

Please note that there are many different combinations of class, parcel type, sorting, and report generation that can be achieved using the PowerChurch Mailroom add-on. Unfortunately, these postal standards are often very complex. The US Postal Service web site is a great resource for documentation on these standards.

Visit <http://pe.usps.gov/> to use the Postal Explorer to browse through the online document archive.

The Postal Customer Council (PCC) offers local seminars and training classes. Visit <http://www.usps.com/nationalpcc/> for more information.

## **Presort Assistant Walk-Through**

1. **Sort Templates** - Saving your settings as a template will save you time and effort next time you send this type of job. Click the "Create New Template" option and assign a name for the template. If you have already done this previously, click the "Use Existing Template" option and choose the template from the list. **Click Next.**

**PRESORT Agent Wizard**

### Sort Templates

You can save your settings as a template for future use.

Template Selection

☐ Do not use template  
☒ Create new template    Name:   
☐ Use existing template

Copy    Delete

| Name | Last Modified |
|------|---------------|
|------|---------------|

2. **Sort Class and Piece Type** - There are several different classes of mail. Add in the different piece types that are eligible for each class and you have the 22 options listed on this screen. For a detailed description of each option, visit <http://pe.usps.com/text/qsg300/q000.htm>. **Click Next.**

**PRESORT Agent Wizard**

### Sort Class and Piece Type

Select a presort class and type of mail piece.

Nonmachinable Letters  
Nonmachinable Flats  
Parcels

**Standard Mail**

Machinable Letters  
Machinable Flats  
Machinable Parcels  
Nonmachinable Letters  
Nonmachinable Flats  
Not Flat-Machinable  
Irregular Parcels

**Package Services**

Irregular Parcels  
Machinable Parcels

Envelopes and other pieces that can be processed on Postal Service equipment and meet the following requirements:

|           | Minimum  | Maximum   |
|-----------|----------|-----------|
| Width     | 5 in     | 11-1/2 in |
| Height    | 3-1/2 in | 6-1/8 in  |
| Thickness | 0.007 in | 1/4 in    |
| Weight    | none     | 3.5 oz    |

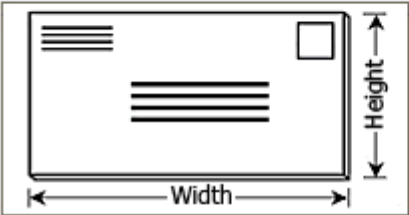
              

3. **Mail Piece Information** - Enter the height, width, thickness, and weight of your pieces. Single letters can be difficult to measure thickness and weight. You can stack a number of pieces together, then enter the weight and number of pieces, as well as the thickness and number of pieces. PowerChurch Mailroom will calculate the proper piece weight and thickness for you. **Click Next.**

**PRESORT Agent Wizard**

**Mail Piece Information**  
Enter the dimensions and weight of your mail piece.

Piece Dimensions



Height: 4.125 in

Width: 9.5 in

Thickness: 0.04 in based on 1 piece(s)

Piece Weight

☒ Fixed: 1 oz(s) based on 1 piece(s)

Help Cancel < Back Next > Finish

4. **Sorting Preparation** - The options that you choose from this list will control the discounts that you qualify for. The different sorting levels represent the amount of "pre-preparation" of the mail that you are able to do, saving work for the postal system, and in turn, saving you money. The sort levels that are available for the Sort Class and Piece Type that you chose in step 2 will be shown in the First Sort Level dropdown list. **Click Next.**

**PRESORT Agent Wizard**

**Sorting Preparation**  
Select sort levels and define sorting options.

Sort Levels

First sort level: Automation

Second sort level: Nonautomation

Advanced Options

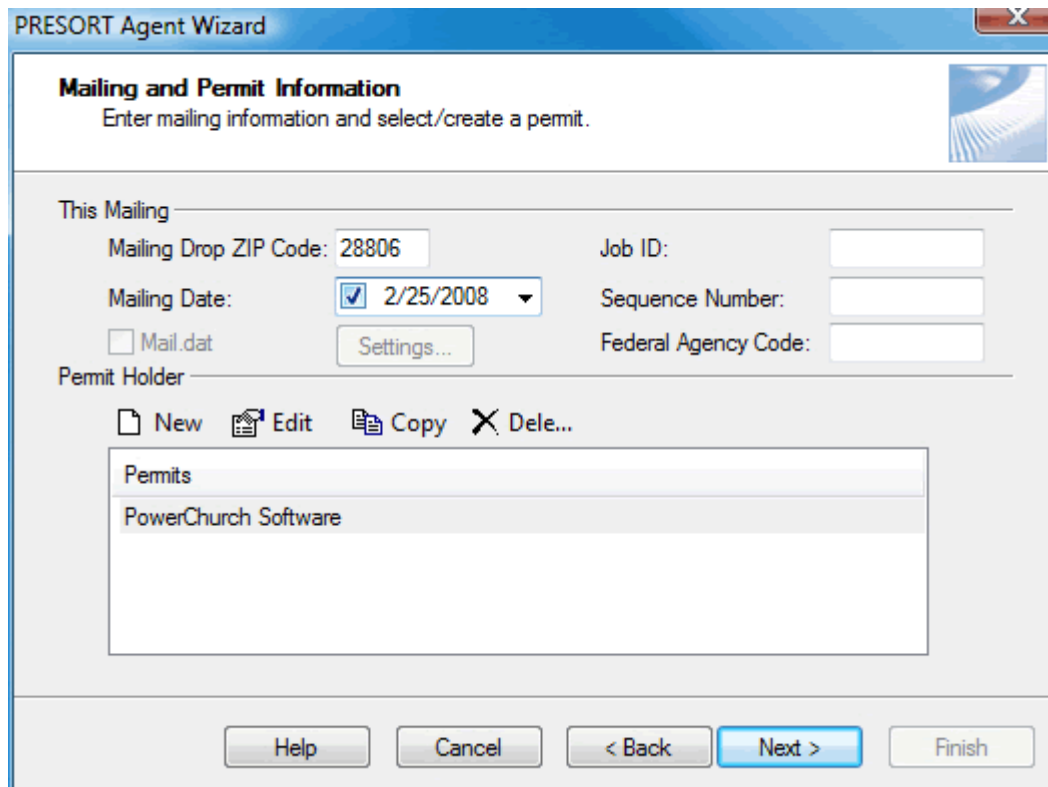
☒ Pieces are barcoded

Use 1' and 2' Trays; 6.00 in. max bundles

Not using pallets

Help Cancel < Back Next > Finish

5. **Mailing and Permit Preparation** - Enter the ZIP Code of the Post Office where you will be dropping off the mailing. Enter the date of the mailing.



**PRESORT Agent Wizard**

**Mailing and Permit Information**  
Enter mailing information and select/create a permit.

This Mailing

Mailing Drop ZIP Code: 28806 Job ID:

Mailing Date: ☒ 2/25/2008 Sequence Number:

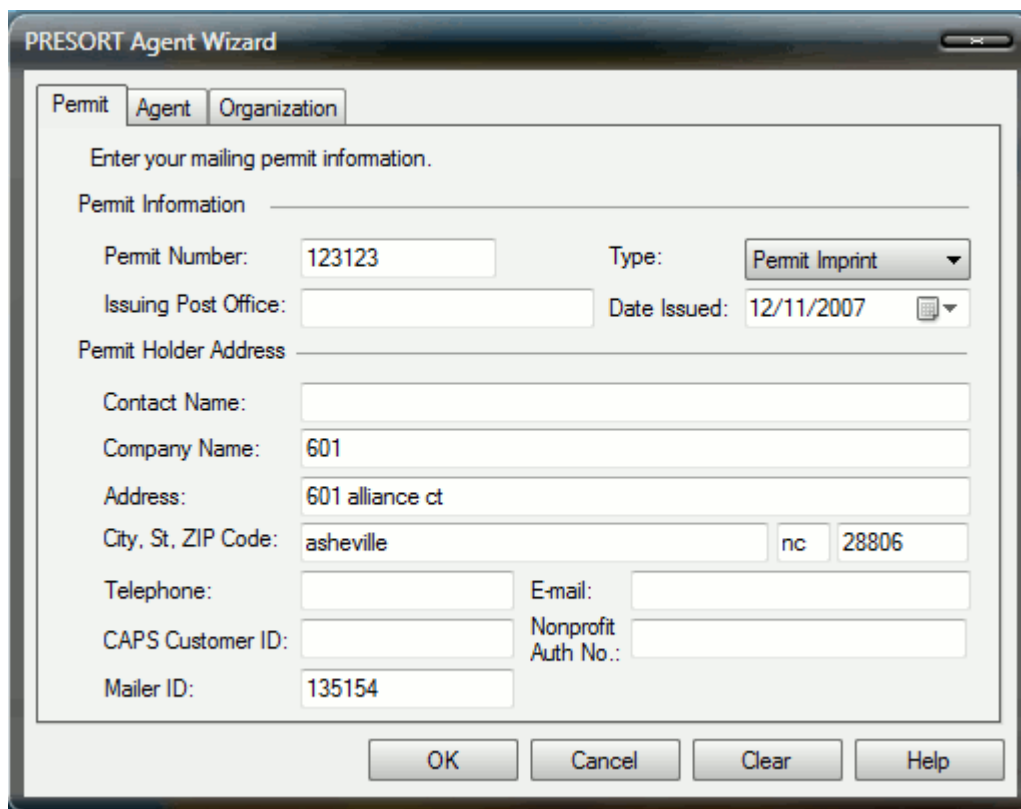
☐ Mail.dat  Federal Agency Code:

Permit Holder

Permits

PowerChurch Software

If you have not yet done so, click the New button toward the bottom left of the screen to add your Permit information.



**PRESORT Agent Wizard**

Permit Agent Organization

Enter your mailing permit information.

Permit Information

Permit Number: 123123 Type: Permit Imprint

Issuing Post Office:  Date Issued: 12/11/2007

Permit Holder Address

Contact Name:

Company Name: 601

Address: 601 alliance ct

City, St, ZIP Code: asheville nc 28806

Telephone:  E-mail:

CAPS Customer ID:  Nonprofit Auth No.:

Mailer ID: 135154

If you will be using Intelligent Mail barcodes, enter the Mailer ID obtained from the Postal Service here. Once this is complete, click OK. Select the Permit name, then **click Next.**

6. **Mail Sort Discounts** - If you have a Nonprofit Permit, check the "Nonprofit rate" option box. In the "Destination Entry Discounts" section, select the location where you will be dropping off the mailing if it is listed. This will increase the discount you receive. **Click Next.**



**PRESORT Agent Wizard**

**Mail Sort Discounts**  
Select the mail sort discounts for which you qualify.

Eligibility Discount  
☒ Nonprofit rate

Destination Entry Discounts  
 Mail Drop Post Office  
☒ SCF ASHEVILLE NC 287  
☐ BMC GREENSBORO NC 27075  
☐ Area Distribution Center (ADC)

☐ Destination Delivery Unit (DDU)  
 ZIP Codes...

☐ Plant-Verified Drop Shipment (PVDS)  
 Facilities...

Help Cancel < Back Next > Finish

7. **Tray Label Layout** - The settings on this screen apply to the tray labels that you will be printing. Choose your printer type, Laser (or Inkjet) or Dot Matrix. Select a label layout from the list, or click the New button to create a new layout. Tray labels generally print 10 per page. It is acceptable to print these on plain paper. Enter the name and address of the church or organization processing the mailing. **Click Finish.**

**PRESORT Agent Wizard**

**Tray Label Layout**  
Describe your label stock.

Printer Type  
☒ Laser or Inkjet ☐ Dot Matrix

Label Layout

| Layouts    | Paper:      | 8.5" x 11.0"  | Details... |
|------------|-------------|---------------|------------|
| 2x5 Sheet1 | Label Size: | 3.25" x 2.00" |            |
| 2x5 Sheet2 | Layout:     | 2 x 5         |            |

Mailer Information  
 Company Name: PowerChurch Software  
 City, State & ZIP Code: Asheville NC 28806

Help Cancel < Back Next > Finish

8. **Progress** - This is the final step of the Presort Mailing Assistant. It contains the final counts of pieces and trays processed at each sortation level. Reports are generated at the bottom left of the screen. Check the boxes for the desired reports, then click Preview (to view on the screen), Print (to send directly to the printer), or Save As

PDF (saves a copy of the reports in Acrobat PDF file format).

The screenshot shows a 'Progress' window with the following sections:

- Job Information:** Presort Template: Newsletter Mailing, Elapsed Time: 00:00:01, Phase: Sort Completed. A green progress bar is at 100%.
- Sort Information:** A table showing the distribution of mail across levels and trays.
- Reports:** Checkboxes for Required (Qualification Report, Postage Report, Drop Shipment Report, Container Labels) and Recommended (Mail Sort Summary, ZIP Code Listing, Container Listing) reports. There are also 'Save to file' and 'Mail.dat' options.
- Labels and Envelopes:** A list of templates with 'Barcoded Labels' selected. Buttons for 'New', 'Copy', and 'Delete' are present.
- Buttons:** 'Preview', 'Print...', and 'Save As PDF...' are at the bottom left; 'Preview' and 'Print...' are at the bottom right; 'Close' is at the bottom right.

| Sort Information       | Count | Trays |
|------------------------|-------|-------|
| Level 1: Automation    | 1,800 | 5     |
| Level 2: Nonautomation | 131   | 1     |
| Level 3:               |       |       |
| Level 4:               |       |       |
| Remainder:             | 52    |       |
| Total:                 | 1,983 | 6     |

| Template        | Modified  |
|-----------------|-----------|
| Barcoded Labels | 2/25/2008 |

Mailing Labels are generated at the bottom right of the screen. Choose the template from the list and click Preview (to view on the screen) or Print (to send directly to the printer).

If you have not yet done so, click the New button found toward the bottom left to create a new Mailing Label template. Choose a template type, whether you want to generate mailing labels, or print directly on envelopes. **Click Next.**

Label Designer Wizard

**Print Mail Template Type**  
Select the type of output to be generated by this template.

Template Type \_\_\_\_\_

☒ Label - Sheet or Continuous  
Select this option to print cut-sheet or continuous-form mailing labels on laser, inkjet, or dot matrix printers.

☐ Envelopes - Graphical Output  
Select this option to print envelopes and mailing pieces on a laser or inkjet printer. You can also select this option if you are using a direct-impression printer that supports Windows print drivers.

☐ Envelopes - Plain-Text Output  
Select this option to send generic text to older-model direct impression printers or printers that require a text file. You can also use this option to control the address location using the printer settings.

Help Cancel < Back **Next >** Finish

Choose the printer that you will be using and the type of printer. **Click Next.**

Label Designer Wizard

**Label Options**  
Select a printer type and model.

Printer Type \_\_\_\_\_

Printer: \\SERVER\Brother HL-5250DN series

☒ Laser or Inkjet  
☐ Dot Matrix  
☐ High-Speed Dot Matrix

Taneum  
Taneum 620  
Taneum 622


Mechanism: Dot Matrix

Help Cancel < Back **Next >** Finish

Choose the type of label / envelope stock you will be using. **Click Next.**

**Label Designer Wizard**

**Label Options**  
Select the layout. Click New to define a new layout if your labels are not listed.

Label Layout:  N...

| Name       | Layout | Height | Width  |
|------------|--------|--------|--------|
| Avery 5159 | 2 x 7  | 1 1/2" | 4"     |
| Avery 5160 | 3 x 10 | 1"     | 2 5/8" |
| Avery 5161 | 2 x 10 | 1"     | 4"     |
| Avery 5162 | 2 x 7  | 1 1/3" | 4"     |
| Avery 5260 | 3 x 10 | 1"     | 2 5/8" |
| Avery 5261 | 2 x 10 | 1"     | 4"     |
| Avery 5262 | 2 x 7  | 1 1/3" | 4"     |
| Avery 5560 | 3 x 10 | 1"     | 2 5/8" |
| Avery 5510 | 3 x 10 | 1"     | 2 5/8" |

Name: Avery 5161  
Layout: 2 x 10  
Label: 1" x 4"  
Paper Size: 8 1/2" x 11"

[Details...](#)

[Help](#) [Cancel](#) [< Back](#) [Next >](#) [Finish](#)

Choose what type of information you want to be included on the label / envelope. Most frequently, you will be choosing "Add an address block with the barcode".

**Label Designer Wizard**

**Address Block Options**  
Select the type of address block to include in this template.

Address Block

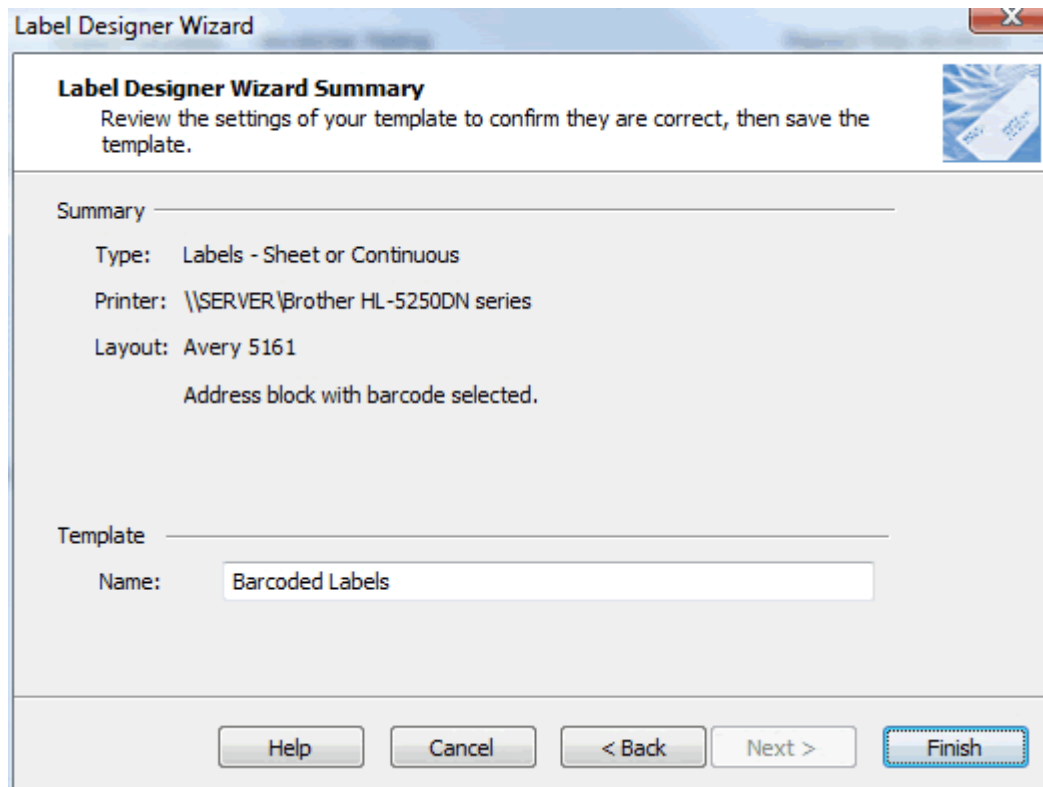
☐ Create a blank template.  
☐ Add a basic address block.  
☐ Add an address block with the endorsement line.  
☒ Add an address block with the barcode.  
☐ Add an address block with the barcode and endorsement line.  
☐ Add a custom address block: [Define...](#)

Address Block Location

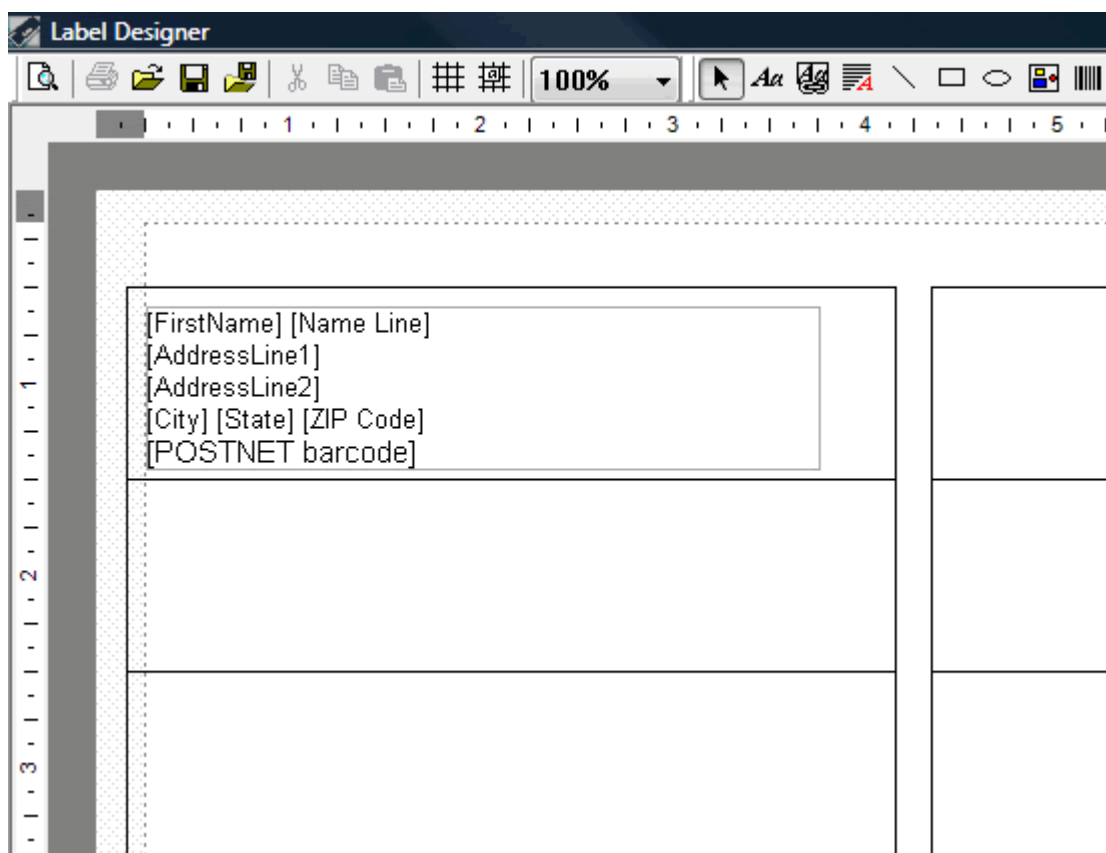
Left Indent:  inches  
Top Indent:  inches

[Help](#) [Cancel](#) [< Back](#) [Next >](#) [Finish](#)

Assign a name for the new template. **Click Finish.**

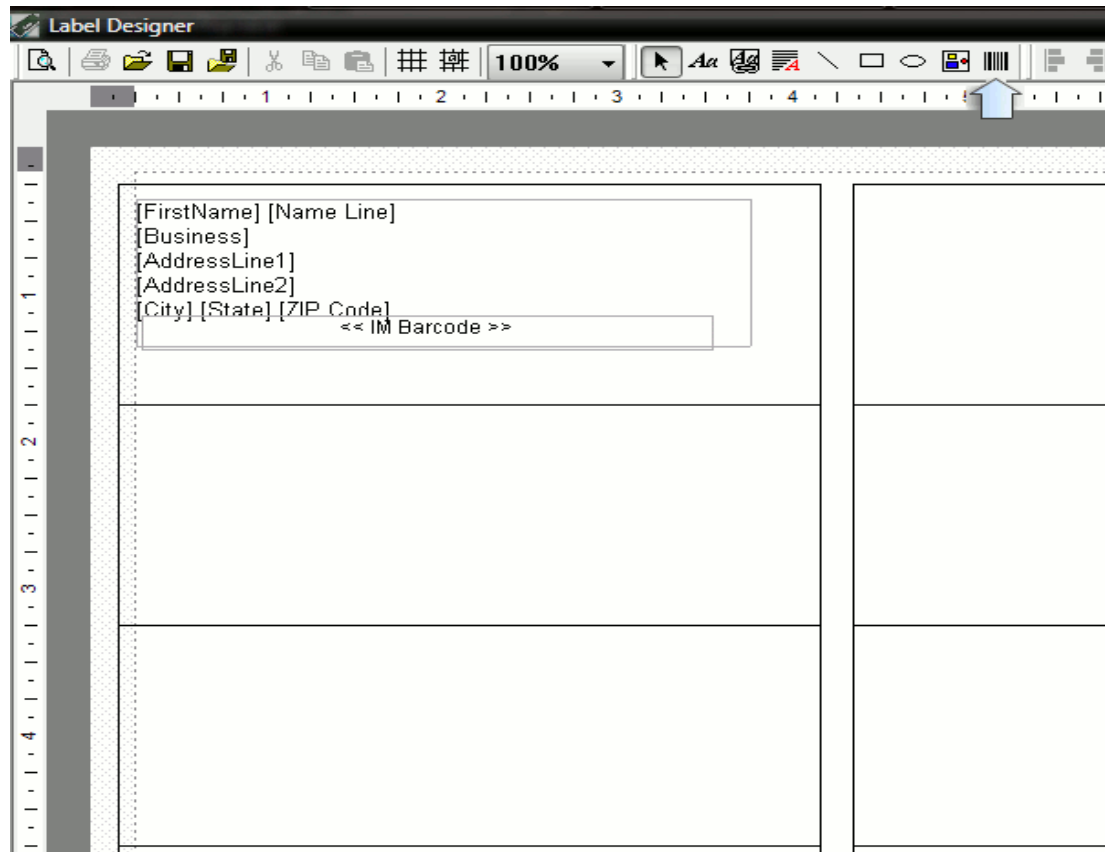


The Label Designer window will open. There are tools to change fonts, move information around on the label, etc. The defaults that appear in the label designer should work fine without any changes necessary. Click the X in the upper right corner of the window to close it. If prompted to save changes, choose Yes.

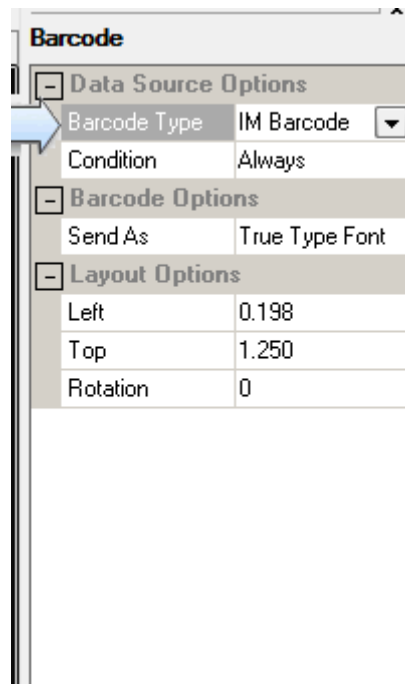


### **To add Intelligent Mail Barcodes:**

In the label designer click the barcode button and click where in the label you would like it added.



On the right hand side of the screen you will see a properties window. Click the "Barcode Type" underneath "Data Source Options" and choose "IM barcode"



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