

CASS Certifying your CDM+ Addresses

The right side of the Membership Utilities window relates to services offered by CDM+/Suran Systems, Inc. to assist you in discount (bulk) mailing through the U.S. Postal Service. These are two different processes with two different purposes. The first service is CASS Certification of your addresses to meet the requirements for Automation Rate permit mailing.

The second service is National Change of Address (NCOA) processing as a means of keeping up with people who move and as a method to meet the USPS Move Update requirement for any type of discount (permit) mail.

CASS Certification

CASS certification is a process in which the addresses in your CDM+ database are compared to a database from the U.S. Postal Service for accuracy. As a result, the address is modified to postal addressing standards (e.g., 123 West Main Street becomes 123 W Main St), the ZIP+4 is assigned and additional information is saved to enable CDM+ to print a delivery point barcode. CASS certification, along with the proper mail piece sortation and supporting documentation for Automation mailing, results in lower Standard (bulk) mail postage rates.

Barcodes will not print for any CDM+ address that is not currently (not expired) CASS certified—even if you have manually entered the ZIP+4. Note that non-automation rate Standard mail is not barcoded and does not require CASS certification. But you must have CASS certified your addresses within 180 days to print valid barcodes and mail at Automation rates. If you are not mailing using discounted Automation rates, you do not need to CASS certify your addresses. However, you may choose to do so for accuracy and possible improved delivery of any class of mail you send.

CDM+ features the ability to easily export addresses for CASS certification, e-mail them to CDM+/Suran Systems, Inc for processing, and easily import the resulting file to automatically update your addresses.

NOTE: There is a nominal fee for the CASS Certification service. Contact CDM+ Sales at 877-891-4236 for more information.

Step 1 – Export Addresses

The first step in CASS certifying your addresses is to export them from CDM+ and send them to CDM+/Suran Systems. CDM+ will automatically e-mail the file to CDM+/Suran Systems, Inc. for processing.

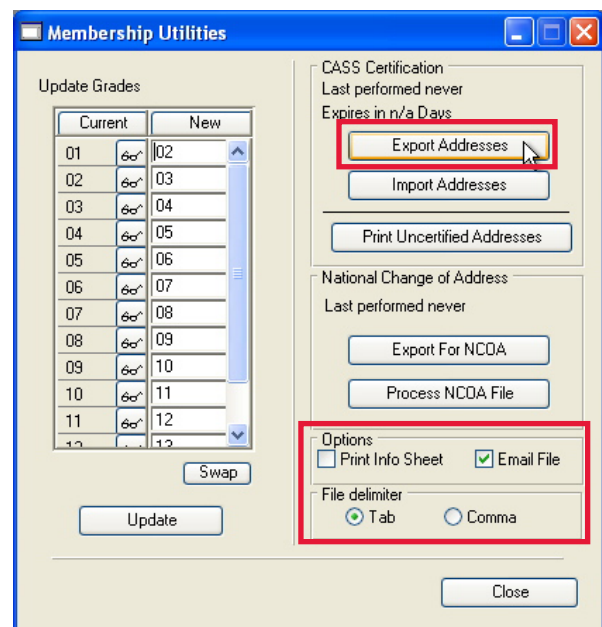
► Membership ► Membership Utilities

First, under the **Options** section on the lower right side of the window, check the box next to **Email File** to have the file automatically e-mailed to CDM+/Suran Systems.

If you would want a report of the number of addresses sent for CASS certification, check the box next to **Print Info Sheet** to print a copy of the Info Sheet (a report of the number of records and fields exported). Whether you check this box or not, this information will be automatically included with the file e-mailed to CDM+/Suran Systems, Inc. so this report is for your records.

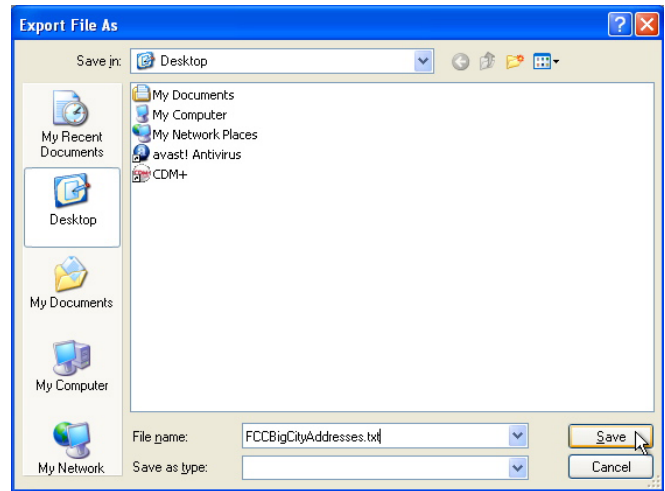
Secondly, under the **File Delimiter** section of the window, click the **Tab** radio button.

Finally, click the **Export Addresses** button under **CASS Certification** in the top right corner of the window.

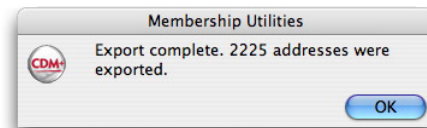


The file name will default to CDM+ Addresses.txt. Change the file name to a more specific name, such as FCCBigCityKY.txt, and save it to your desktop or My Docs folder.

Note: You will not need to do anything with this file, but it is necessary to create it before it can be automatically e-mailed to CDM+/Suran Systems, Inc.



When the export is complete the message to the right will appear. Click **OK**.



Step 2 - Email File

You will be prompted for your name, the church name and location and your e-mail address. This is the address to which we will return the processed file.

Be sure to include your city and state—you be surprised how many churches who use CDM+ have the same name!

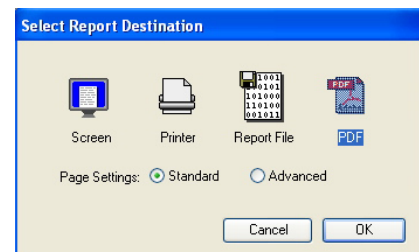
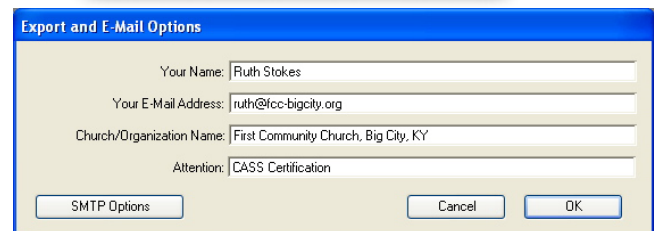
Put "CASS Certification" in the **Attention** field.

Click **OK** and your addresses will immediately be e-mailed to CDM+/Suran Systems, Inc. for CASS certification. If you get an error message, you may not have e-mailing from CDM+ set up. Contact CDM+ Tech Support at 800-633-9581 for help.

IMPORTANT! Make sure the return e-mail with your processed addresses will not be blocked by your ISP or e-mail program. Your completed CASS certified file will come as an attachment to an e-mail from **cass@cdmplus.com**. If you do not see it in your In Box within 1-2 business days, check your Junk mail!

Next, if you checked the **Print Info Sheet** box, you must select the destination for the Info Sheet report. If you don't want to print the report, you can save it as a Report File (.rep) or PDF (Enhanced Notices feature required).

This report is for your information only. Whether you checked this box or not, the information is included in the e-mail with your addresses.

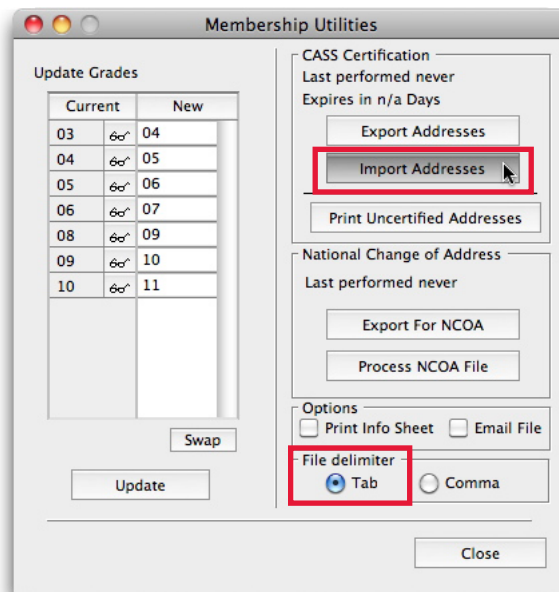


Step 3 - Import Addresses

Within 1-2 business days, CDM+/Suran Systems, Inc. (cass@cdmplus.com) will return an e-mail with a zipped file attached. It will be named something like FCC Big City Cert Addresses.zip. Save the attachment to your desktop.

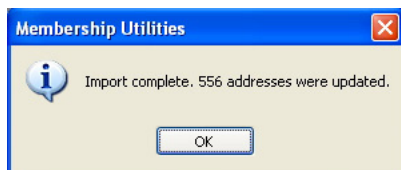
Double-click the icon to unzip the file. You will have a folder that contains your Cert Addresses.txt file (for example, FCC Big City 09-11-09 Cert Address.txt) and 2 PDF documents. The one PDF is a CASS Summary Report (PS3553) showing that your address list has been CASS Certified. Keep this report on file in case your Post Office has any questions about an Automation rate discount mailing. The other PDF is a list of error codes that may be assigned to an address during the certification process. This is for your reference when viewing the Uncertified Addresses report.

After unzipping the file e-mailed from cass@cdmplus.com, select **Membership Utilities** from the **Membership** menu. Select **Tab** as the Field Delimiter in the Options section. Click the Import Addresses button under CASS Certification and click **OK**.

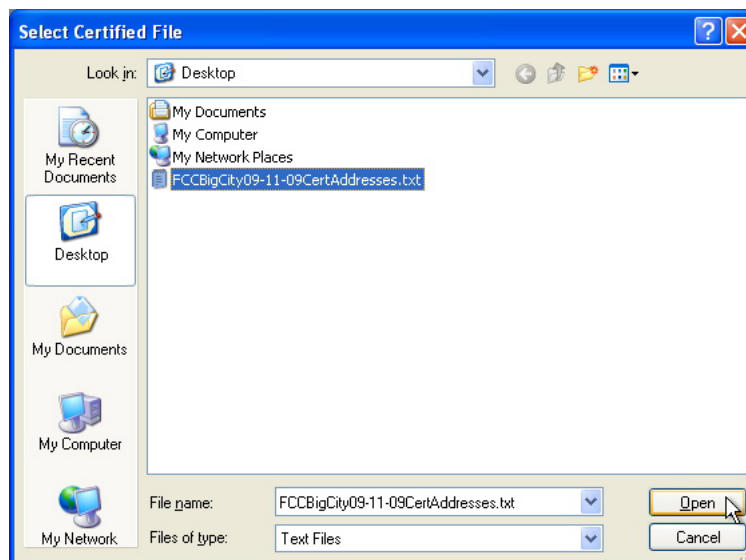


Browse to select the Cert Addresses.txt file. If you cannot see the file, make sure you unzipped the attachment. You may need to drag the Cert Addresses.txt file from the folder before you can see it. CDM+ will import the addresses.

After CDM+ has finished importing the file, you will get a message window giving the number of records imported. Click **OK**.



CDM+ can now print barcodes on any certified address.



Note: Just because an address did not certify, it may still be mailed at Standard Presort rates in the same mailing as the barcoded Automation rate mail (as long as you have a minimum of 200 pieces mailing at Automation rate). The non-barcoded pieces will be sorted separately and mail at a higher postage rate. For more information, contact your Post Office.

Timing of CASS Certifying

The U.S. Postal Service requires the CASS Certification process to be done every 180 days in order to qualify for Automation postage rates. The CDM+ **Membership Utilities** window will show the date that CASS Certification was last performed and how many days until the certification expires. Once your CASS certification expires, CDM+ will no longer print barcodes on addresses. We suggest you make a note to export and e-mail your address file to CDM+/Suran Systems a week to 10 days before the CASS certification is due to expire.

Print Uncertified Addresses

Now that CDM+ has updated your addresses, if you wish you can print a report of those addresses that were unable to be certified.

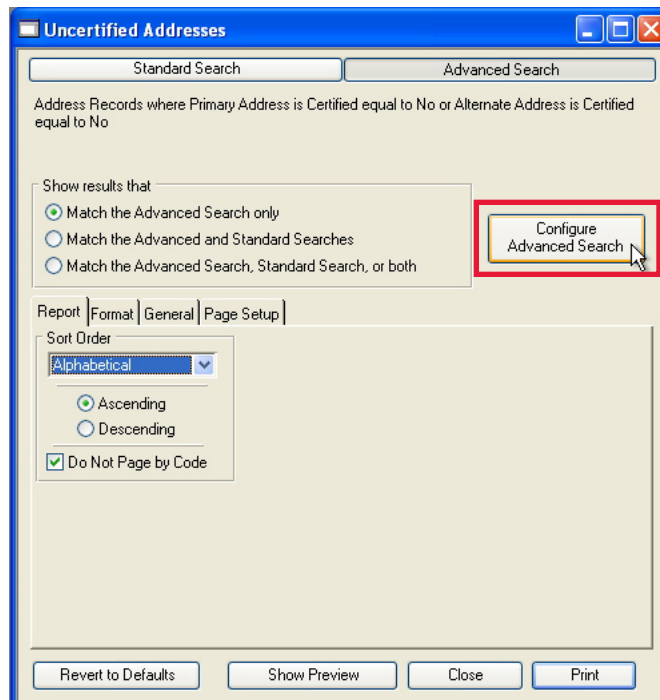
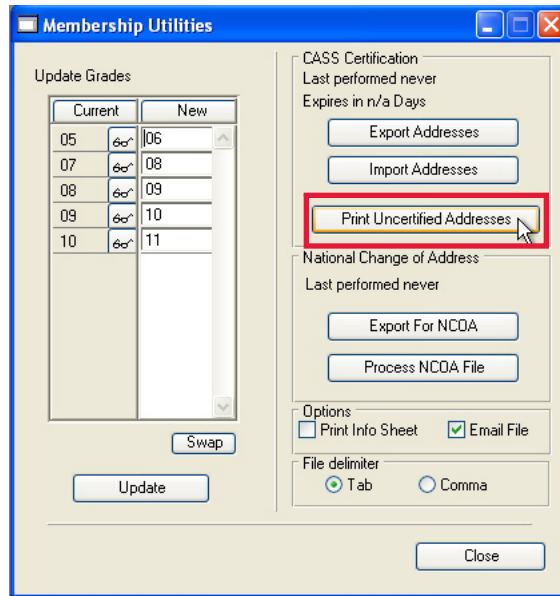
There are 2 purposes to doing this: 1) it's a quick way to check that you imported the correct file (if all addresses show up on the report, you probably didn't) and 2) it gives you a list to work from if you wish to update uncertified addresses in CDM+ so that next time you submit your file for CASS certification, more addresses will certify.

Click the **Print Uncertified Addresses** button on the Membership Utilities window.

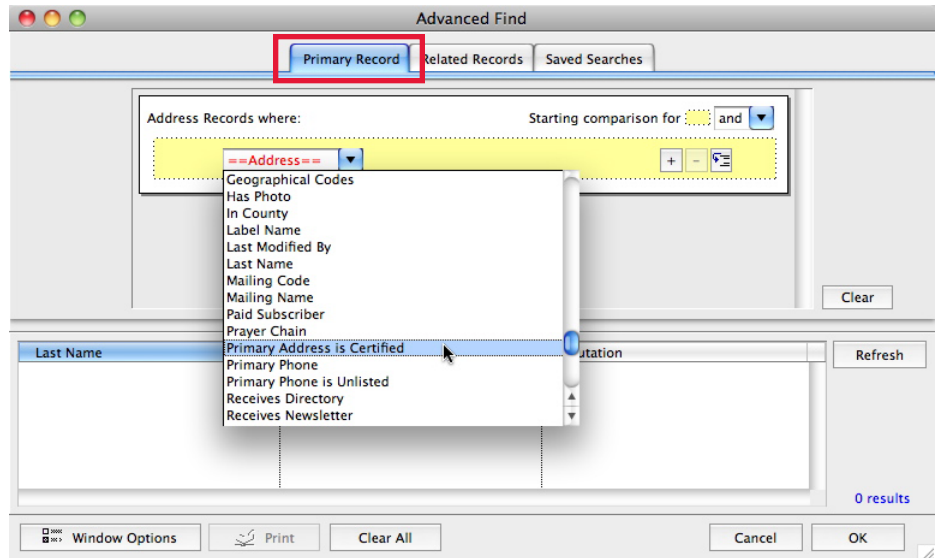
The **Uncertified Addresses** report setup window will open.

Now's a good time to setup and save an Advanced Search for Uncertified Addresses.

Click the **Configure Advanced Search** button.



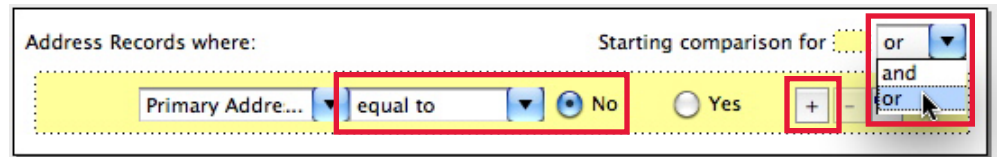
With the **Primary Record** tab selected on the Advanced Find window, choose **Primary Address is Certified** from the **==Address==** drop list.



Make sure the search is as shown: **equal to No** to find the UNCERTIFIED addresses.

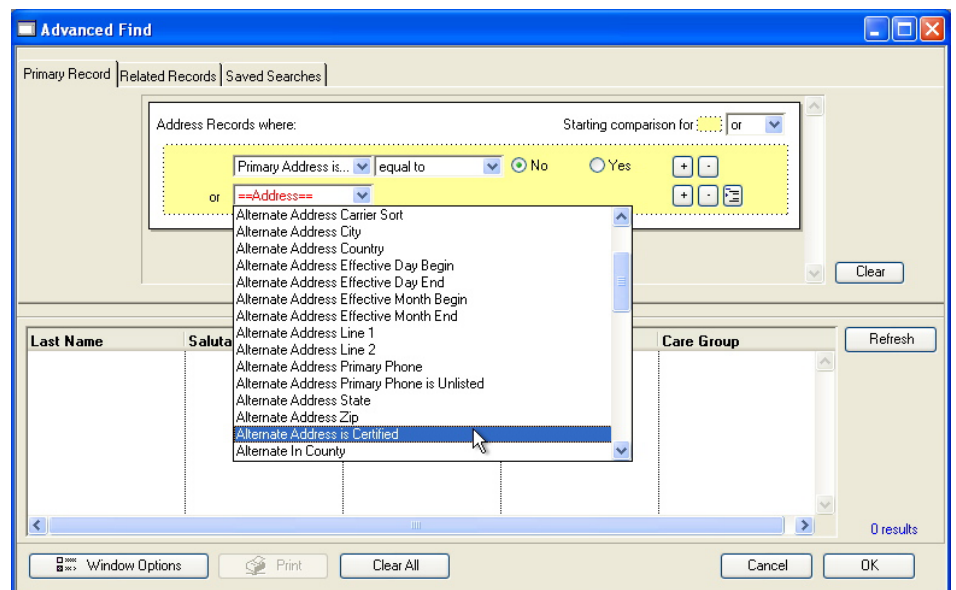
Choose **or** from the drop list as the **Starting comparison**

Click the + button to add another line to the search.



Select **Alternate Address is Certified** from the **==Address==** drop list.

Again, make sure the search is as shown: **equal to No** to find the UNCERTIFIED addresses.



You have now identified all uncertified addresses in your CDM+ database.

Next, you'll want to save the search so that you can reuse it again.

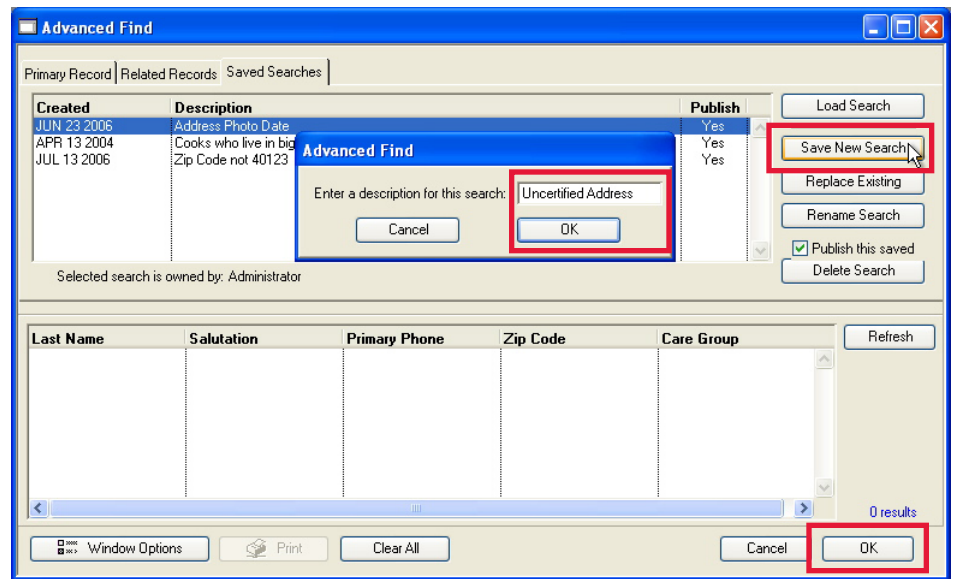
Click on the **Saved Searches** tab of the Advanced Find window.

Click the Save New Search button, give your search a name and click OK.

(Next time you want to print the Uncertified Addresses report, you would click **Configure Advanced Search** and then click on the **Saved Searches** tab. You would then find and highlight this search in the list and click the **Load Search** button. Click **OK** and proceed with printing the report.)

Click **OK** on the Advanced Find window (lower right corner) to return to the report setup window.

Continue printing the report as you would any CDM+ report.



The resulting report will list error codes for addresses that did not certify. Refer to Appendix B, page 25 of the **CASS Error Codes PDF** (which is included with your returned certified address file) for what these codes mean.

It may be anything from a misspelled street name to a missing apartment number or directional (E, W, N, S) that caused the software to be unable to certify an address.

Uncertified Addresses

First Community Church
123 Main Street
Versailles KY 40383-1234
859/555-1234

Address Records where Primary Address is Certified equal to No or Alternate Address is Certified equal to No

Name	Address	City, State	Zip	CASS Error Codes
Mr. & Mrs. William Allen	1674 Stevens Lane	Big City, KY	40123	4.1
Mr. & Mrs. Jose Alvarez	5678 Blue Spruce St	Big City, KY	40123	5.1
Mr. & Mrs. Robert Andrews	2944 Fox Run Road	High Point, NC	27389	3.1
Clyde & Cari Baker	1311 Shady Ln	London, KY	40741-1550	4.1
Big City Gazette	447 Main Street	Big City, KY	40123	6.2
Mr. & Mrs. Melvin Brown	495 Tower Road	Palo Alto, CA	94306	5.1
Mr. Samuel Chun	8975 Charter St Apt 202	Big City, KY	40123	3.1
Central Baptist Church	128 Main Street	Big City, KY	40123	6.2
North Street Christian Church	3844 John Henry Road	Big City, KY	40123	3.1
Mr. & Mrs. Charles Cook	975 Murray Rd	Big City, KY	40123	6.2
Mike and Angie Cooksey	PO Box 1183	Big City, KY	40123	4.1
Mr. & Mrs. Albert Delvecchio	1660 Island Dr	Big City, KY	40123	6.2
Mr. & Mrs. Michael Disney	107 Peachtree Dr	Big City, KY	40123-2318	5.1
Mr. & Mrs. David Emerson	284 Sandy Springs Road	Albany, NY	12212	3.1
Becky Hansen	123 Poplar St Apt 100	Bigger City, KY	40055	2.1
Mr. and Mrs. Juan Hernandez	115 Falls St	London, KY	40741-1655	3.1
Mark & Andrea Hunter	419 W 2nd St	London, KY	40741-1873	5.1
Mr. and Mrs. Robert Jones	4589 Littleton Rd	Big City, KY	40123	5.2
Bruce Landfels	4236 Elm Tree Ln	Big City, KY	40123	6.2
Mr. & Mrs. Ralph Lucas	1299 Chatman Lane	Big City, KY	40123	6.2
Mr. and Mrs. Jose Martinez	873 Primrose Ln	Big City, KY	40123-4752	5.1