



Bulk Mailer® Walkthrough

With Bulk Mailer, you will save time and money on your mailings. This guide will help you get up and running with Bulk Mailer. The first section of this document describes the Bulk Mailer installation and requirements. The Bulk Mailer Orientation section gives a quick overview of the Bulk Mailer interface and working environment. Everyone should read this section to quickly understand and use Bulk Mailer to its fullest.

A step-by-step tutorial is included with Bulk Mailer. To access it, select Programs from the Windows Start menu. In the Bulk Mailer folder, select the Bulk Mailer tutorial to begin.

Installation

System Requirements

Operating System:	Windows 2000, XP or Vista	
Disc drive:	DVD	
	Minimum	Optimal
Processor:	Pentium 1 GHZ	Dual Core 2.5 GHZ or better
Memory:	512 MB RAM	3 — 4 GB RAM
Hard drive:	10 GB free space	

USPS® address correction files are extremely large. For optimal performance, our address management products require reasonably up-to-date computing power for address verification and correction. While the program will run with the minimum system requirements, performance increases dramatically with more memory.

Installing Bulk Mailer

To install Bulk Mailer, you must have Internet Explorer version 5.01 – Service Pack 2 or higher installed on your computer. To verify the version number, launch Internet Explorer and select About Internet Explorer from the Help menu.

If not already on your computer, the Bulk Mailer installer will install Microsoft® .NET framework and the latest service pack for .NET. Your computer may automatically reboot once or twice as a result, but the installation process will pick up where it left off.

Be sure to close any open applications before beginning the Bulk Mailer installation process or you may lose unsaved data when your computer reboots. If access to your computer is password protected, you will need to enter the password after each reboot, just as you would each time you start your computer.

To begin installation, place the Bulk Mailer DVD in your DVD-ROM drive. The installer should launch automatically. If it does not, navigate to your drive and double-click the file Setup.exe.

Uninstalling Bulk Mailer

If you need to uninstall Bulk Mailer for any reason, use the Add/Remove Programs utility in the Windows Control Panel.

Bulk Mailer Orientation

This section will help you start using Bulk Mailer productively as quickly as possible. It provides an overview of the wizard/template architecture that the program uses and the Bulk Mailer working environment, so you can find exactly what you need.

Bulk Mailer Mailings

Mailings contain all of your address data. Most program functions require an open mailing. Once you create a mailing, add to it by either importing data or typing in data directly. Work with the entire mailing or apply a Group to create a subset of your mailing based upon criteria you define.

Wizards and Templates

Bulk Mailer makes every step in the address management and mailing process easy thanks to wizards and templates. Almost every section of the program uses wizards and templates to remove guesswork and simplify repetitive tasks.

Wizards walk you through every function of the program. On each screen, you configure part of the chosen mailing function. Advanced users can display all of the steps of the wizard on one screen using the Power Wizard.

Throughout every wizard in Bulk Mailer, each screen has a Help button. Click it to bring up a context-sensitive help page with information about the screen you are currently viewing. This help page explains each option and setting on each screen in detail.

In most cases, the wizards allow you to save your settings as a template. The next time you want to perform the same function, use the saved template rather than walk through the wizard process again. In Bulk Mailer Business and Professional, you can combine several templates into a single process with the Job Builder.

The Bulk Mailer Working Environment

Bulk Mailer has a number of features that make it easier to use. Any time you hover the cursor over a tool or button, a ScreenTip will display and identify the purpose of that tool. In the lower left corner of the screen, the Data Details window displays the Current number of selected records, the Group applied (if any), the Total Count of all records in the mailing, and the Mailing of the mailing you have open.

If you have not applied a Group, the Current number and the Total Count should be the same. If you have filtered your mailing into a Group, the number of records that match your criteria will display as Current. The Total Count will still display the total number of records in the mailing.

Any action or task that you perform will affect the currently open mailing or the active Group. Always be sure to verify in the Data Details window that you have the correct mailing or Group open before doing anything with your data.

Program Navigation

You have two methods of getting around Bulk Mailer: the Navigation Bar and the menus. The Navigation Bar is the column along the left side of the screen that lists all sections in the program. It persists between pages, so you can move around quickly.

The menus, listed along the top, can directly launch any wizard, apply any predefined Group template to the currently open mailing or display the active address records with any View template. You can access a special menu, the Action menu, from the Action button on most pages. This menu contains mailing or template maintenance functions for page.

Now let's get familiar with each section of the program.

Home

The program always opens to the Bulk Mailer Home page. You create and manage your mailings on the Home page. This is the only section of the program where you work directly with mailings. In all other sections of the program, you work with templates that manipulate the data in your mailings. Click the Home icon on the Navigation Bar to return to the Home page.

- **Folders** – You can organize your mailings into folders. Add, edit and remove folders in the Folders bar. Drag and drop mailings from the list into a folder to move that mailing.
- **New Mailing Wizard** – Walks you through each step necessary to create, name and save a new mailing. Once created, mailings display in the list below the wizard.
- **Reprint Reports** – At the bottom of this screen, you can access the last five Address Correction and Move Update reports and last 10 Mail Sort reports generated for the selected mailing. Print, view or save these reports as PDF files.

Import/Export

You import data into or export data from the mailing lists created in Bulk Mailer on the Import/Export page. This page is divided into two sections: one for Import and one for Export. Each section has its own wizard and Template List.

- **Import Wizard** – Import data into a mailing from a variety of mailing formats and map data fields. You can save the settings as a template for future use with any source file and any mailing. Once created, Import templates display in the Template List below the wizard.
- **Export Wizard** - Export address records from a mailing into various file formats. You can save the settings as a template for future use with any mailing and any destination file. Once created, Export templates display in the Template List below the wizard.

Groups

You create subsets of your mailings based on specific criteria on the Groups page. A Group can limit which records the wizards and templates affect, or it can just sort the records in a specific order. To remove a Group and select all non-deleted records, apply the All Records Group.

- **Group Wizard** – Select Group conditions and sort order. You can save the settings as a template for future use with any mailing. Once created, Group templates display in the Template List below the wizard.

Address Quality

Perform various address maintenance and update functions on the Address Quality page. Run Address Correction on your mailings, obtain real-time* Move Update information via the Internet, run a Duplication Search on your mailings and perform Merge/Purge operations. Because these functions are dynamic, Address Quality does not use templates. Therefore, the Address Quality page looks different from other sections of the program.

- **Address Correction** – Create standardized, corrected mailings and validate the deliverability of each address. You can customize the correction processing routine and add additional sort data, such as Line-of-Travel (LOT), Geocode and RDI™[†]. The Address Correction wizard produces PS Form 3553 – CASS™ Summary Report.
- **Move Update** – Obtain the latest USPS® NCOA^{Link®} address update information. This wizard connects via the Internet to the most current forwarding address information made available by USPS. The Move Update interface is included in Bulk Mailer Business and Professional. Bulk Mailer Standard users may purchase the Move Update add-on. Each address processed requires a small fee. Additional Move Update credits can be purchased at any time. If you process a large amount of addresses regularly, you may want to upgrade to an unlimited Move Update contract. For more information, contact Satori Software Sales at sales@satorisoftware.com or call (800) 553-6477.
- **Duplication Search** - Identify and optionally remove duplicate records. Specify the criteria for how the search is conducted and review identified records before eliminating them.
- **Merge/Purge** – Combine multiple mailings and remove duplicates, optionally removing addresses found on an exclusion list or keeping only those addresses that match an inclusion list. Merge/Purge is an optional Add-on for the Bulk Mailer Professional edition.

Views

Look your address records in one of two formats on the Views page. List Views display data in a spreadsheet-like grid. Detail Views show you your data in address card formats. In these views, you can manually enter new addresses and correct individual addresses. You can create new List Views with a wizard and save them as templates, but Detail Views cannot be customized.

- **List Views** – Examine all selected records in a spreadsheet format. With the List View Wizard, you can customize which data fields display and then save those settings as a template. In a List View, you can correct individual records, edit all records with the Mass Edit Wizard and create custom reports.
- **Detail Views** – Examine individual records in an address card format. The Detail Views section has three pre-existing Views: Main View, which shows all fields; Rapid Entry View, which shows basic information and automatically fills in City and State based on the ZIP Code™ field; and Address Card View, which only displays address information. These views are fixed and cannot be customized.

* Satori Software receives weekly NCOA^{Link} updates.

[†]RDI requires an additional USPS license.

Mail Sort

Presort your mailing lists, manage mailing permit information, define and print tray/sack labels and print postal reports on the Mail Sort page. This section is where you can achieve the greatest savings on your mailing.

- **Mail Sort Wizard** – Define your presort criteria, create and manage multiple mailing permits and produce postage reports and tray/sack labels. This wizard makes the complicated process of sorting mail much easier.

Print Mail

Design mailing pieces, envelopes or label formats and print your records on the Print Mail page. By either launching an existing template or using the wizard to create a new one, you can access the Label Designer, a fully featured label and envelope layout tool.

- **Print Mail Wizard** – Design and layout labels, envelopes and mailing pieces. Select from a pre-configured list of common Avery label stocks and standard envelope sizes and configure your address block. Then the wizard launches the built-in Label Designer, where you can precisely lay out a custom design as it will look when printed. The Label Designer supports specific high-speed address printers with custom drivers.

Job Builder

Combine templates and processes from the other sections of the program on the Job Builder page. The final job will run an entire mailing process without any intervention. *Job Builder is available only in Bulk Mailer Business and Professional.*

- **Job Builder** – Automate and run entire mailing jobs. By combining processes and the templates from any other section, you can automate an entire mailing – from creating a new mailing, importing a list and sorting the data, to address correction processing, presorting and printing labels or envelopes.