

# **Move Update** Guide

## Move Update

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Move Update matches the addresses in your mailing list against the change-of-address data in the USPS NCOA<sup>Link</sup> database to find updated addresses for your records. Because it works via the Internet, the Move Update Add-on provides nearly real-time information. Move Update helps you avoid the delays of the regular USPS mail-forwarding process and increases your overall address quality by updating your lists with current addresses.

### Unlimited Move Update

High-volume Move Update users can obtain the Unlimited Move Update Add-on, which allows you to process as many address records as you wish without worrying about credits. This feature requires an additional registration key, so contact your Satori Software account representative for more information.

### Obtaining Move Update Information

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Move Update is available from the Address Quality page. The functions performed by the Move Update Wizard are dynamic, therefore you cannot create and save templates.

*The Move Update Sign On screen.*

**Move Update Wizard**

**Sign On**  
Register or connect to Satori Software's online Move Update service.

**Login**

User ID: 123456  
Password:   
 Save password

**Processing Option**

Create Account  
 Process List  
 Renew Account

Help Cancel Previous Next Finish

### ■ To Open the Move Update Wizard

1. Click the Address Quality icon on the Navigation Bar to move to the Address Quality page.
2. Click the Start button on the Move Update bar to launch the Move Update Wizard.
3. Click Next. The Sign On screen will display.

### Signing in to the Move Update Server

#### ■ To Register as a New Customer

1. Select the Create Account option and click Next. The Customer Type screen will display.
2. Select your customer type:
  - **Client** – Someone who owns the lists being processed by the Move Update service.
  - **Agent or Broker** – Someone who processes lists on behalf of third parties and returns the lists to them upon completion.
  - **List Administrator** – Someone who keeps and maintains third party-owned lists on their behalf.
3. Click Next to display the Contact Information screen.
4. Complete the company and user information fields. The USPS requires a valid NAICS Code. Click the link below the NAICS Code field for more information about this and to locate the code for your industry if you do not already have it.

If you are registering as a Broker or List Administrator, you will also have to provide contact information on the Client Contact Information screen for each of the clients for whom you will be processing lists. This is required by the USPS.

5. Click Next to display the Account Notification Method screen.
6. Select the method for receiving your account and login information. You can receive this information via either fax, e-mail or postal mail.
7. Click Next to display the Move Update Wizard Summary screen.
8. If all your information is correct, click Finish. The Print screen will display, from which you can print the Move Update forms.
9. Print the forms, sign them and either fax or mail them to Satori Software. The address and fax number are on the forms. Be sure you sign the form before you fax or send it. The USPS will not permit us to create an account without a signature on the form.

## ■ To Sign On and Run Move Update as a Current Customer

Once you have registered and received your password, the Move Update service can be used at any time. The Sign On screen can optionally remember your password so that you do not need to enter it each time you use the service.

1. Your User ID will already be filled in on this screen. Enter the password that Satori Software gave to you. You can have this wizard remember your password by checking the Save Password box below the Password field.

Be sure to keep your original subscription materials in a safe place. Then, should anything happen to your computer, you can still access the Move Update service without interruption.

2. Click Next to display the Move Update Processing Options screen.

## Using the Move Update Wizard

### ■ To Set Processing Options

1. Specify the processing options for Move Update to use:
  - **Matching Logic** – The type of change-of-address that Move Update will look for. The broadest results will be realized by selecting Business, Individual and Family. If you select Business only or Individual only, no other types of moves will be retrieved.

*The first screen of Processing Options.*

- **Multiple Input Names** – Specifies how to handle move records with more than one name. You can search using a common last name, search using each name or skip the record entirely.

2. Click Next to display the second Move Update Processing Options screen.
  - **Oldest Move Date** – You can use this field to exclude records older than a certain period of time, up to 48 months. Any move older than that is automatically excluded.
  - **Class of Mailing** – If you are uncertain or do multiple classes of mailings, select All.
  - **Review New Addresses** – You can choose to either see all retrieved moves first or accept all changes sight unseen and have them immediately written to your mailing.

*The second screen of Processing Options.*

3. Click Next. The Address Correction Formatting Options screen will display.

### ■ To Set Address Correction Options

In order to ensure the best results, Bulk Mailer will run Address Correction on the mailing before submitting it for Move Update processing. Select the formatting options that you want applied to the corrected addresses:

- **Unit Information Placement** – For addresses with unit, apartment or suite information, you can place this data on the delivery address line following the street number and name, or on a line by itself above the delivery address line.
- **Address Element Format** – For each of the four address elements (Directionals, Street Suffix, Unit Designator and Rural Route/Highway Contract) you can choose to abbreviate using standard USPS abbreviations, to spell out the address element in full or to abbreviate with punctuation marks.

- **Casing** – You can choose the case format that address data is returned in: Mixed Case, UPPERCASE or lowercase. You can also select whether or not the business and name fields should be returned in the same case as well.

Note: Applying Mixed Case to the Business Name field will render a name like “ABC” as “Abc.”

- **Uncorrected Addresses** – Selecting Update when possible will update the city, state and/or ZIP Code whenever possible, even if the entire address cannot be corrected. This helps speed up the manual correction process for uncorrected records.

Click Next to display the Move Update Wizard Summary screen.

Verify that all your information is correct. If anything needs to be changed, click Previous to return to the page of the wizard where you want to make changes. When you are done making changes, click Finish. The Move Update Progress screen will display, and processing will begin.

## The Move Update Progress Screen

This screen shows the progress and statistics for the current Move Update process. It shows summary results for both the Address Correction and Move Update processes. When processing is finished, you can print PS Form 3553 and the NCOA<sup>Link</sup> Processing Summary Report.

### Printing the PS Form 3553 and NCOA<sup>Link</sup> Summary Reports

Click the Print button to print PS Form 3553 and the NCOA<sup>Link</sup> Processing Summary Report. The reports for the last five Move Update processes are saved automatically. Previous reports are then overwritten. To avoid this, click the Save as PDF button to save the reports as PDF files.

To retrieve and/or reprint the automatically saved reports, navigate to the Home page and in the Reprint Reports section under Move Update, click the Reprint button. You can also right-click the Move Update Start button on the Address Quality page and select Reprint Reports. This will display the Reprint Reports dialog box.

You can save the reports as a PDF file from this dialog box as well. There is no limit to the number of PDF files you can save, besides storage space on your local and network drives. The saved PDF files are not accessible from within Bulk Mailer or from the Reprint Reports dialog box. Use Adobe Acrobat to view and print saved PDF files.