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Bulk Mail Basics

How to fly that eagle!

For most churches, bulk mailing can be a nightmare! Trying to jump through the “Postal” hoops to get the cheapest rate has been the cause of more than one headache.

But knowing a few of the Bulk Mail Basics and using your CMS for Windows system, you can save your church some money, and yourself a migraine!

Okay, basic number one, what the heck is Bulk Mail, anyway?! Bulk Mail (also called “Presorted”) refers to preparing a bunch of mail, in a certain way, and getting cheaper postal rates.

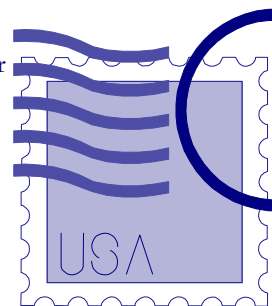
Why would you get cheaper postal rates? Because you’re doing the work for the Post Office! The more work you do for the post office, the cheaper your postage!

What do you need to do to bulk mail? There are a few things you need to do well in advance of your first bulk mail. You need to:

- Get a mailing permit and pay the annual mailing fee
- Pay for postage using pre-canceled stamps, postage meter, or permit imprint (you must submit a form and pay a one-time fee to use the permit imprint)
- Determine the size, shape, and weight of the item you’re going to mail, sizes for letters are:
 - Must be rectangular.
 - At least 3½ inches high by 5 inches long by .007 inch thick
 - No more than 6⅞ inches high by 11½ long by 1/4 inch thick
- Ensure that your addresses are accurate... i.e. get CASS CERTIFIED (see page 2)
- Sort/Print your labels or mailers in zip code order
- Take your mail to the post office where you hold your mailing permit

How many pieces do you have to mail to qualify for bulk mailing?

- 500 Pieces for First Class Mail
- 200 Pieces for Standard Mail (or 50 pounds of mail)



What’s the difference between First Class and Standard Class mail?

The more work you do for the post office, the cheaper the postage!

First Class Mail

- Can be anything mailable, bills, statements, personal correspondence.
- Will be delivered faster.
- Free forward and return
- Presorted discounts are offered

Standard Class Mail

- Advertisements, circulars, newsletters. Must weigh less than 16 ounces.
- Delivery is not very speedy!!
- No free forward and return
- Presorted discounts are offered

So, exactly how much money can you save? Again, depending on how much work you (or your volunteers!) are willing to do, you can plan on saving some money!

Let’s start with the rates. In Standard Class mail, there are **Regular** rates and **Non-Profit** rates. Regular rates are for every type of business.

Non-Profit, ohhh, sounds like a church, right? Well, yes and no. You have to apply for and receive authorization from the post office before you can take advantage of these super cheap postal rates. And just because you’re authorized as Non-Profit, it doesn’t mean that everything you mail qualifies for the Non-Profit rates. Double check with your local post office before you design and print your mail piece.

(continued page 2)

How to fly the eagle (cont.)

What do you need to receive authorization to mail as a **Non-Profit** organization?

- Get a copy and fill out *Form 3624, Application To Mail At Non-Profit Standard Mail Rates*. You can get this form on line at www.usps.com or at your local post office.
- You must submit some required documentation with your application to support your claim for non-profit rates (formative papers, IRS letter of exemption from payment of federal income tax, etc.). You can also provide additional supporting documentation (bulletins, minutes of meetings, brochures, etc.)
- Submit the completed form 3624 and supporting doc to your postmaster or at the business mail entry unit (where you drop off your bulk mail).

It usually takes about two weeks for your application to be approved.

Let's talk about the Sort Levels, **Presorted Basic** and an **Automated**. What's the difference? Basically, it's the bar code or lack thereof.

If you have a bar code on your label it means that the post office can run that mail through it's machines and doesn't need a human being to touch it, so it's cheaper for them, and you can use the Automated rate which is cheaper for you.

If you don't have a barcode on your label then lowly humans must touch the mail and we're more expensive, and you'll have to use the Presorted rate.

But STOP! You can't just print a bar code on your label and expect the post office to take it, this is the post office after all! You need an eligibility form! Are you eligible to use a bar code on your labels? Only if you are CASS Certified.

Now, what about this **CASS CERTIFICATION** business? CASS (Code Accuracy Support System) is just a process where you send your addresses from CMS to another company, Applied Mailing Technology, that will make sure all of your addresses meet all the requirements of the post office.

They'll change all of the STREET's to ST, and all of the AVENUE's to AV, they'll put in all of the Zip+4 codes, all of the delivery points, all of the carrier routes, plus they give you all of the forms you'll need to tell the post office you've done this process! Whew!

With all of that done, you can now print your labels with bar codes and take advantage of the "Automated" postal rates, which are REALLY cheap!

But, if you're not CASS Certified, **DO NOT**

PRINT THE BAR CODE ON YOUR LABELS!!!

The post office will throw the whole run back at you and make you re-do your mailing!

Last, but not least, you need to decide if you qualify for the **Enhanced Carrier Route** rates. Which are mailings of 200 pieces or more, addressed, sorted, and marked (meeting PO requirements). The mailing would need to have groups of 10 or more to one carrier route, prepared in line-of-travel or walk-sequence order (basically, which route does the postman take when he walks up and down the street!). The pieces of mail that don't meet those qualifications, i.e. 9 or fewer to a carrier route, can be mailed First Class.

If you use Automated Enhanced Carrier Route you will need to go through the CASS Certification process four times per year. If you do not use the Enhanced Carrier Route rates but you still want to use the Automated rates, you only need to get CASS Certified every six months.

Confused yet?

Your best source of information is going to be your local post office and/or business mail entry unit. You can also check out www.usps.com. Look for *Business Mail 101, Smart Choices for Beginning Mailers*, this will answer your questions and help you in this process.

Now, none of this stuff makes any sense, until you look at the money you can save.

The chart below reflects a 1000 piece mailing of a one ounce piece (one envelope with one piece of paper in the envelope and a label). Check out <http://dbcalc.usps.gov/iframe.htm> for personalized rates for your church.

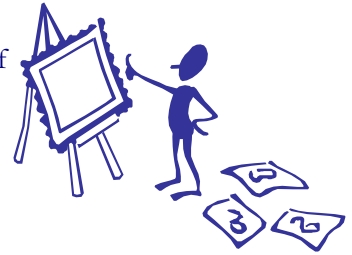
"You can't just print a bar code on your label and expect the post office to take it, this is the post office after all! You need an eligibility form!"

| What is it?? | Class | Rate | Sort Level | Each |
|--|----------------|----------------------------------|-------------------|-------------|
| <i>Plain ole regular mail</i> | First Class | Non-Automatic | Single-Piece | 37¢ |
| <i>Bulk First Class</i> | First Class | Non-Automatic | Presorted | 35.2¢ |
| <i>Plain ole regular Bulk Mail</i> | Standard Class | Regular | Presorted Basic | 26.8¢ |
| <i>Bulk sorted by Carrier Route</i> | Standard Class | Regular Enhanced Carrier Route | Presorted Basic | 19.4¢ |
| <i>Bulk Mail with a Barcode—Needs CASS Cert</i> | Standard Class | Regular | Automation | 21.9¢ |
| <i>Bulk Mail with a Barcode sorted by Carrier Route—Needs CASS Cert</i> | Standard Class | Regular Enhanced Carrier Route | Automation | 17.1¢ |
| <i>NP Bulk Mail—Need Authorization</i> | Standard Class | Nonprofit | Presorted Basic | 16.5¢ |
| <i>NP Bulk Mail sorted by Carrier Route —Need Authorization</i> | Standard Class | Nonprofit Enhanced Carrier Route | Presorted Basic | 12.6¢ |
| <i>NP Bulk Mail with a Barcode—Needs Authorization & CASS Cert</i> | Standard Class | Nonprofit | Automation | 14.4¢ |
| <i>NP Bulk Mail with a Barcode sorted by Carrier Route—Needs Authorization & CASS Cert</i> | Standard Class | Nonprofit Enhanced Carrier Route | Automation | 11.1¢ |

End of Year Tips and Tricks

- You can now print customized End of Year Checklists from the Reports Menu from your CMS for Windows Membership, Contribution, Attendance, Fund Accounting, and Payroll Systems?
- Print a Contribution Analysis Graph for the current year, or each of the past five years on whatever fund you choose?
- Did you know that you can print up Statistical Summaries from your Membership System that will make even the most picky number-cruncher drool?
- Look for your Payroll tax table updates in the mail, they'll be shipped in early 2003.

- We will mail you an end of year tax preparation booklet as part of your Annual Support Contract.



End of Year Tips and Tricks

- If you haven't completed your budget yet, check out the Budget Worksheet. Click Reports | Budget History | Budget Worksheet. You'll save yourself tons of time and Energy.

Support Contracts and Automatic Monthly Payments via EFT

We are pleased to announce that you can now pay for your Annual Support Contract by Automatic Monthly Payment via EFT (Electronic Funds Transfer).

We will divide your Annual Support Contract in 12 monthly automatic payments, and your bank account will be debited on or after the 10th day of each month by 1/12th the total amount of your annual support or product/training, rounded up to the nearest dollar.

With Automatic Monthly Payments:

- The payment is divided into 12 monthly amounts
- More money remains in your bank account longer to earn interest

- You don't have to remember to send a check. It's automatic!
- Save time with one less check to approve, prepare, stamp, address and mail
- No worries about lapse of service or missing product upgrades
- Annual payment is spread out over the whole year for more consistent budgeting.

Just fill out the form enclosed in your Annual Support Contract, include a voided check, and you're enrolled in the Automatic Monthly Payment program.

Call Karen Johnson at (800) 247-8044 ext 524 for further information.

"With Automatic Monthly Payments, your annual payment is spread out over the whole year for more consistent budgeting."

Communicating with TSL

When you call into The Software Library for technical support, one of the first things we ask is "What is your Church's Serial Number?"

When we have your serial number, we already know your church name, phone number, main contact person, and what product you have.

We need your Church's Serial Number when you are communicating with TSL in other ways, too. If you fax a Technical Support Request, if you send in a set of backup

disks, if you mail a letter, or if you e-mail your question, all communications should have your church's serial number. It would also be a good idea to include your church name, address, phone number and contact name.

The other item that's necessary on all communications to TSL is the name of the TSL Representative that should receive the communication. Who do you want this to go to? We can help you faster if we don't have to spend time figuring out who you are!



We can help you faster if we know who you are!

The Software Library

3300 Bass Lake Road, Suite 304
Brooklyn Center, MN 55429

Phone: (800) 247-8044
Phone: (763) 566-4212
Fax: (763) 566-2250
E-mail: support@SoftwareLib.com



Get Your Order in for Self Sealing Statements

If you haven't already seen the Self Sealing Mailer/Statement forms in action yet, do yourself a favor and call Karen Johnson at TSL for a sample.

These wonderful little time-savers will allow you to print up your Contributor Statements with a Postal Permit right on the piece!

You print them...

You fold them...

You mail them...

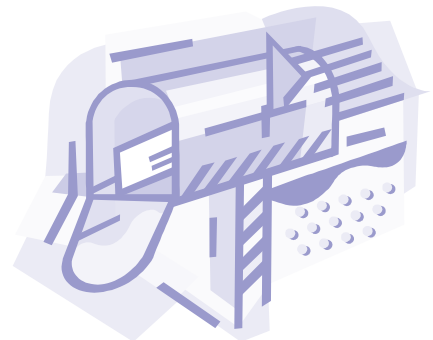
That's it!

No more stuffing, licking, and stamping envelopes!

The cost for the Self Sealing Mailer/Statements start at \$240.00 per case of 2000, with discounts for Clients with an Annual Support Subscription and more discounts for clients ordering three or more cases.

Get your order in early, as they're moving fast!

Call Karen Johnson at (800) 247-8044 to place your order today!



Order your Self Sealing Mailer/Statements today!