



Mailing Equipment & Software

StreetSweeper® Pro

User Guide

Canada English Edition
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Installing StreetSweeper Pro

Follow these instructions if you are installing StreetSweeper Pro for the first time.

1. *Before you begin*
2. *Downloading the installer*
3. *Running the installer*
4. *Install the application*
5. *Downloading Canada Post data*
6. *Install the latest data*
7. *Keep your data updated*
8. *Automate the update process*
9. *Troubleshooting*

1 Before you begin

Before installing StreetSweeper Pro, please ensure that your system meets the following minimum requirements:

- **Operating System:** Windows 10 or later
- **Processor:** Intel i5 or equivalent
- **Memory:** 8 GB RAM
- **Storage:** 3 GB of free disk space
- **Graphics:** DirectX 11 compatible graphics card
- **Internet Connection:** Required for software activation and updates.

2 Downloading the installer

1. Open your web browser and navigate to the [Streetsweeper Pro Official Website](#).
2. Go to the **Download StreetSweeper Pro Updates** section.
3. Click on the latest StreetSweeper Pro Windows version download link to download the installer.

3

Running the installer

1. Locate the downloaded installer Zip file (StreetSweeperPro_X.X.XX.zip), where X is the version number in your Downloads folder.
2. Unzip the file.
3. Double-click the installer to run the **setup.exe** file.
4. If prompted by User Account Control, click **Yes** to allow the installer to make changes to your device.

4

Install the application

1. Follow the on-screen instructions in the installation wizard.
2. Read and accept the License Agreement.
3. Choose the installation directory. The default directory is recommended.
4. Select **Install** to begin the installation process.
5. Once the installation is complete, click **Finish** to exit the installer.

StreetSweeper Pro is now installed on your system.

5

Downloading Canada Post data

1. Go to StreetSweeper Pro Monthly Data Section.
2. Navigate to the latest StreetSweeper Pro Available Data link.
3. Select the file for download. The first 2 digits indicate the year, and the second 2 digits indicate the month.
4. Unzip this file.

6 Install the latest data

Install SSProDataXXXX.exe on your computer.

1. Choose the installation directory. The default directory is recommended.
2. Click **Install** to begin.

7 Keep your data updated

Monthly updates:

1. Check the StreetSweeper Pro Download Page once a month for the latest data from Canada Post.
2. Repeat the installation steps to install new data.

8 Automate the update process

1. Download and install **IntelliLink® Desktop**, a Windows application that keeps your Pitney Bowes software products current with the latest software and data file updates. This will allow you to manage updates in one place.
2. The IntelliLink® Desktop download link is located at the bottom of the StreetSweeper Pro Download Page.

9 Troubleshooting

If you encounter any issues during installation, please refer to the [Support Page](#).

Registering for an account in the License Manager

All new users must register for an account. The registration link is located at the bottom of the login form.

1. Select **Sign up Now** to register as a new user.
2. Fill in the registration form and input all the required information.
3. Select **Register**.
4. After your information has been verified, you will be able to log in to the application with your e-mail and password.

Related Topics

- Logging into the License Manager in StreetSweeper Pro
- Resetting passwords in the License Manager in StreetSweeper Pro
- Adding Additional Users to StreetSweeper Pro

Logging into the License Manager

Once you have registered your account, you can log into the License Manager.

1. Input your login credentials and select **Sign In**.
2. An authentication window will appear. Input the authentication code and select **Submit**. The code can be sent to your email by selecting **Send one time code**.

Related topics

- Registering for an account in the License Manager in StreetSweeper Pro
- Resetting passwords in the License Manager in StreetSweeper Pro
- Adding additional users to StreetSweeper Pro

Resetting passwords in the License Manager

If you have forgotten your password or want to change it:

1. Click **Forgot your password?**.
2. Enter the required information and select **Send Reset Link**. You will be sent an email with the link to reset your password.
3. From the Reset Password form, select **Change** when complete.

Related topics

- Registering for an account in the License Manager in StreetSweeper Pro
- Logging into the License Manager in StreetSweeper Pro
- Adding additional Users to StreetSweeper Pro

Adding additional users

To allow your additional users to access StreetSweeper Pro, set them up in the License Manager.

1. Select an available serial number from the drop-down menu. Enter the new user's email address into the **On Boarding Email** text box.
2. An email will be sent to the new user with the serial number needed to register.

Related topics

- Registering for an Account in the License Manager in StreetSweeper Pro
- Logging into the License Manager in StreetSweeper Pro
- Resetting passwords in the License Manager in StreetSweeper Pro

Logging into StreetSweeper Pro

To open StreetSweeper Pro, double click its icon or select the program from your Start bar.

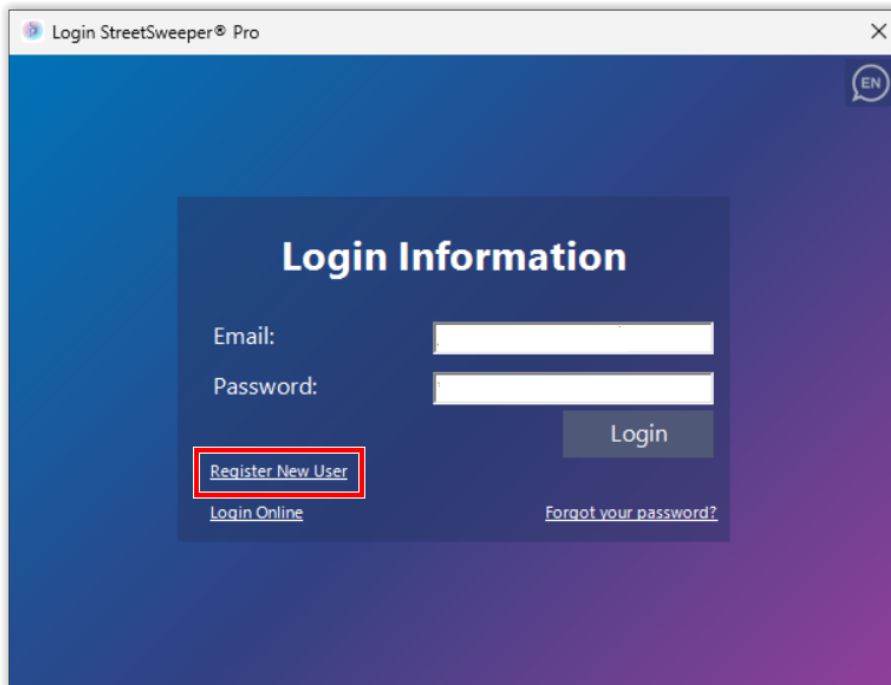


- [Logging in as a new user](#)
- [Logging in using an existing account](#)

Logging in as a new user

Once the login screen appears:

1. Select **Register New User**.

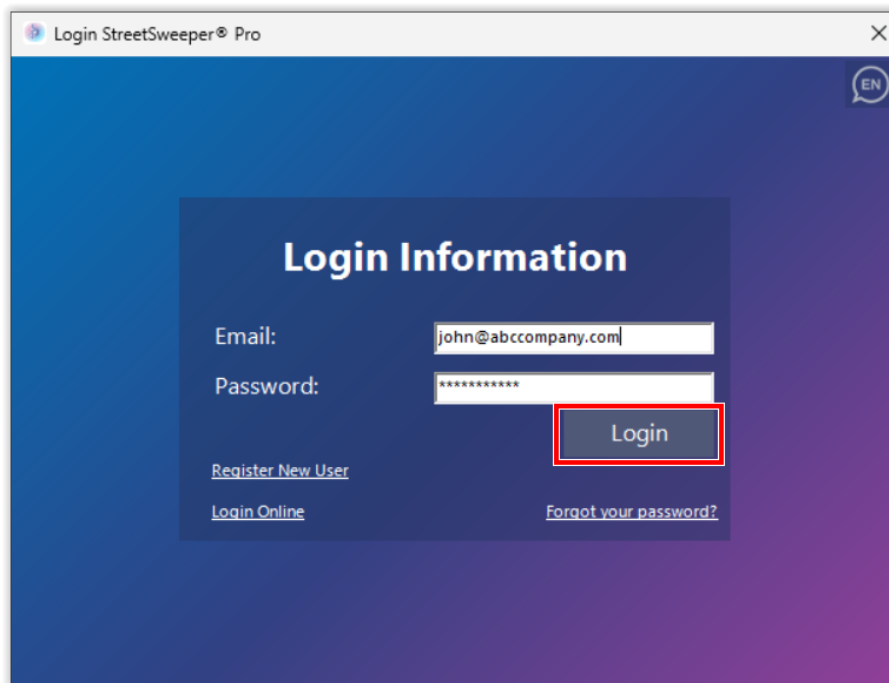


2. Enter the required information to set up your account. Once your information has been verified, you will be able to log in using your email address and password.
3. Enter your email and password.
4. Select **Login**.

Logging in using an existing account

Once the login screen appears:

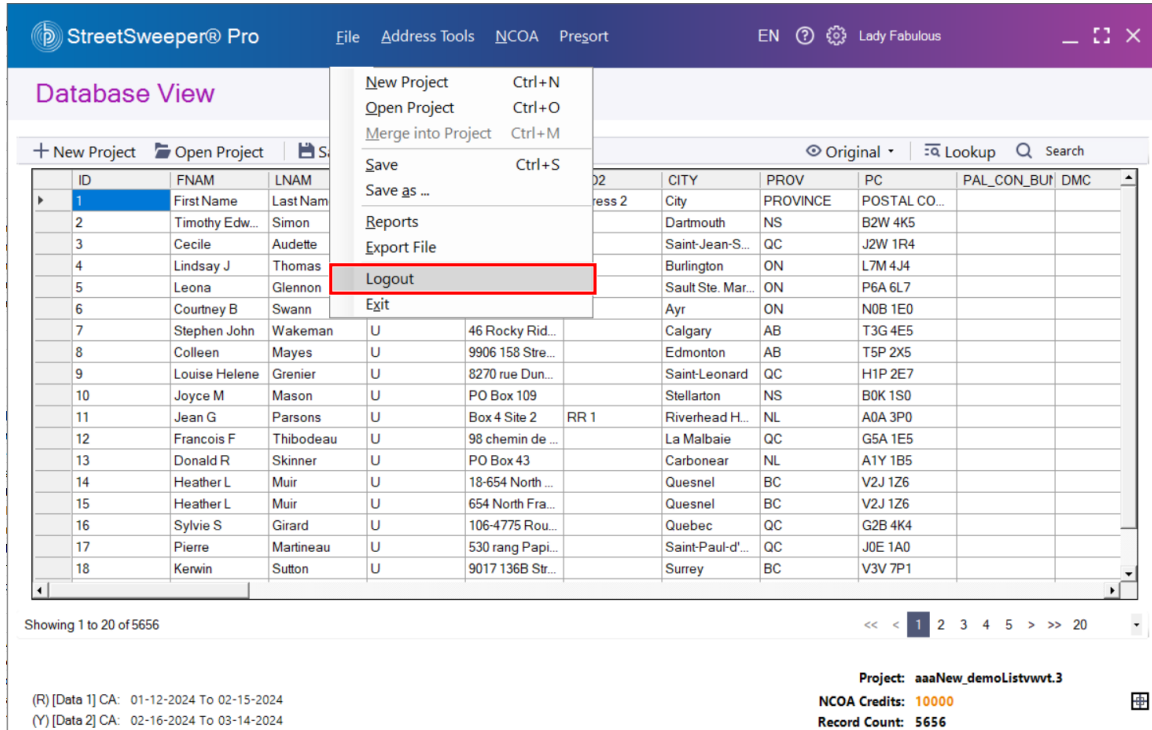
1. Enter your email and password.
2. Select **Login**.



Exiting or logging out of StreetSweeper Pro

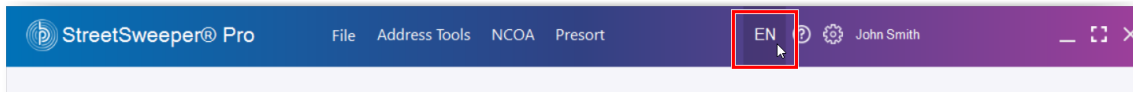
You can exit the application or log out an individual user.

1. To exit the application, select **File > Exit**. This will close the application and log out the user.
2. To log out a user but leave the application open, select **File > Logout**.



Changing languages in StreetSweeper Pro

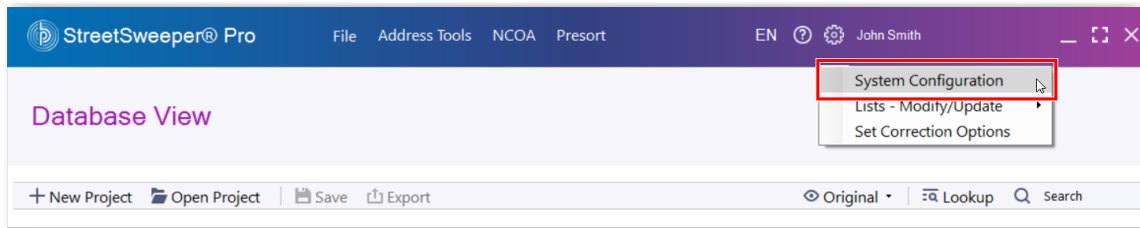
To change between English and French display, select the EN or FR icon beside the Help icon.



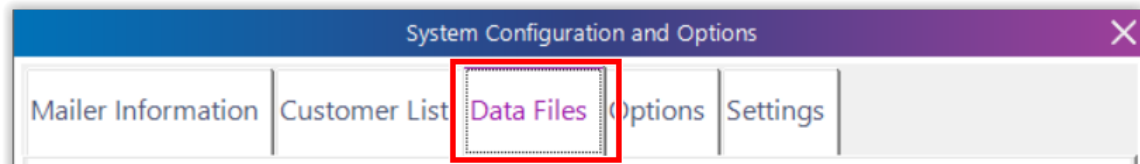
Setting default data paths

This function allows you to specify the default directories for input and output files, the usual work directory, and the directories that contain Canada Post and table file databases.

1. Select the Settings icon then **Settings > System Configuration**.



2. Select the **Data Files** tab.

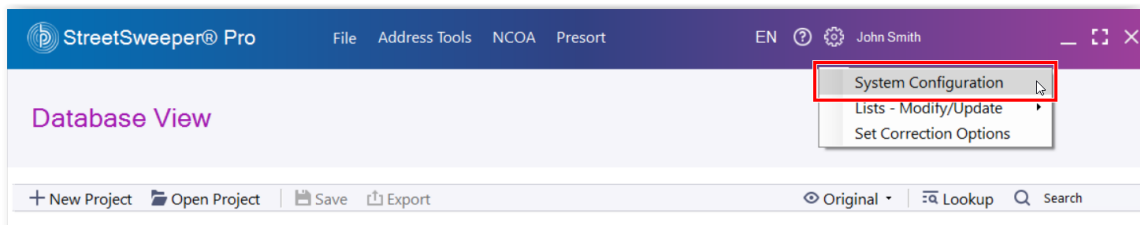


3. Select the **Browse** button and navigate to the appropriate folder for each directory.
4. If the **File Input** and **File Output** folders will not remain constant, you can check **Remember Last Path**. StreetSweeper Pro will then return to the last location you selected for input or output files.
5. When you are satisfied with your changes, select **Update**.

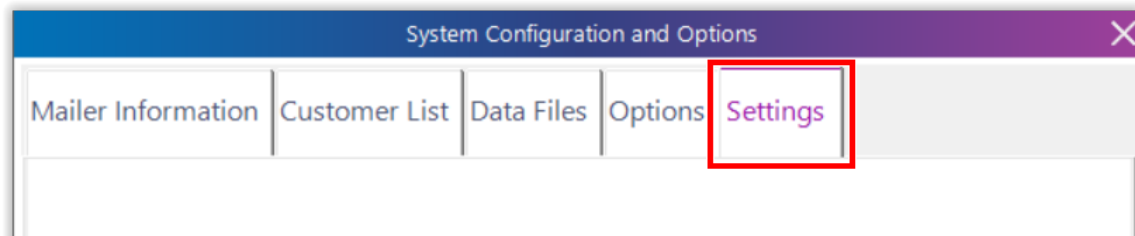
Managing the autosave functionality

This feature will automatically save Projects after certain functions, such as correction, have been completed.

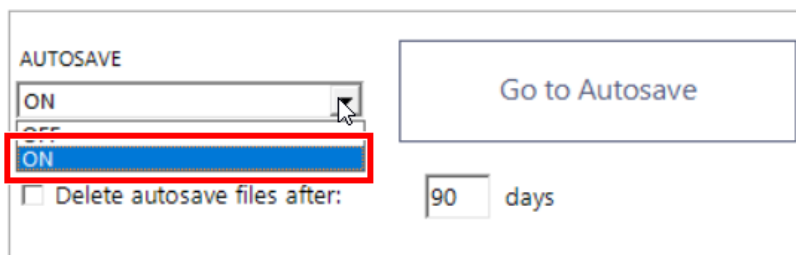
1. Select the **Settings** icon, then **Settings > System Configuration**.



2. Select the **Settings** tab.



3. Set **Autosave** to **ON**.



4. To automatically delete autosaved Projects, check **Delete autosave files after:** and enter the number of days in the text box.
5. Select **Update** to save your changes.

To manage your autosave directory, select the **Go to Autosave** button. Your system will open to the default autosave directory and you can delete or move files from there.

Setting up default company information

The company information entered into StreetSweeper Pro will be applied to reports. This information only needs to be entered once and then is stored as a default. The information can be updated at any time by returning to this screen.

1. Select the **Settings** icon then **Settings>System Configuration**.
2. Select the **Mailer Information** tab.
3. Enter the name and contact information that will be printed on reports.
4. Select **CPC Account Numbers and IDs** to enter the company's Canada Post account number, contract number (if applicable) and NCOA Terms of Use ID (if applicable).
5. Select **Accept**.
6. After verifying the information is correct, select **Update**.

Editing your company information

Any information edited on the Mailer Information screen will be shared and accessible to other users on your account.

1. Select **Settings > Mailer Information**.
2. Edit the information you wish to appear on the Correction and/or Mailing Summaries.
3. If applicable, select **CPC Account Numbers and IDs** to edit Canada Post account, contract, and Terms of Use information. Select **OK**.
4. Select **Update**. You may now close the screen.

Entering your customer's information

StreetSweeper Pro provides a database of your customer information, including name, address, and associated Canada Post account information. You will be able to select a customer when creating a Project. Their information will then appear on Canada Post reports.

It is mandatory to create a customer record with an End User Terms of Use ID if you will be processing their file against NCOA.

Once customer information is entered, it will be shared and accessible to other users on your account.

1. Select **Settings > Customer Information**.
2. Select **Add Customer**.
3. Enter the information you wish to appear on Project reports.
4. If applicable, select **CPC Account Numbers and IDs** to enter your customer's Canada Post account, contract, and Terms of Use information. Select **OK**.
5. Select **Update**. You may now close the screen.

Related topics

- [Creating and entering your End User Terms of Use ID](#)

Editing your customer's information

Once customer information is edited, it will be shared and accessible to other users on your account.

1. Select **Settings > Customer Information**.
2. Select the customer record you wish to edit. Select **Edit Customer**.
3. Edit the information you wish to appear on Project reports.
4. If applicable, select **CPC Account Numbers and IDs** to edit your customer's Canada Post account, contract, and Terms of Use information. Select **OK**.
5. Select **Update Customer**.
6. Select **Update**. You may now close the screen.

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Navigating the main dashboard

You will access most functionality from the main dashboard. The main menu bar is at the top of the screen. There are several shortcuts and icons available, including:

1. A French/English language toggle.
2. The Help menu.
3. System configuration and program default settings.
4. Starting new projects or opening existing ones.
5. Saving the Project file or exporting output files.
6. Filtering your database to display selected records, including:
 - a. The original input file
 - b. Valid records
 - c. Corrected records
 - d. Invalid records
 - e. Duplicate records
 - f. Suppressed records.

Viewing, filtering, or searching the Project database

After creating your Project, you can view, filter, and search the database.

- [Viewing functions](#)
- [Filtering functions](#)
- [Searching the database](#)

Viewing functions

- Clicking on a heading will sort the database in ascending order by that field.
- Clicking the same heading again will sort the database in descending order by that field.
- Fields can be resized by dragging divider lines.
- Use the scroll bars on the right and bottom of the view window to navigate through the page.
- Use the page selectors on the bottom right to move through the database.

Filtering functions

Filtering functions become available after various processing has been applied. Selecting an option will show only the records that apply.

- **Original:** All records in the database.
- **Valid:** Only records that have been flagged as valid after correction processing.
- **Corrected:** Only records that have been flagged as corrected after correction processing.
- **Invalid:** Only records that could not be corrected during correction processing.
- **Duplicate Records:** Records flagged as duplicates within the Project based on user specifications.
- **Suppression Records:** Records that will be suppressed within the Project based on user specifications.

Searching the database

- For a simple search of the field the cursor is in, enter the search term in the text entry box beside the magnifying glass. Hit the **Enter key**.
- For an advanced search, select the magnifying glass. Enter the search parameters and select **Search**.

Looking up an address using the drill-down functionality

StreetSweeper Pro has an integrated lookup that will allow you to find an address using a drill-down functionality. This is accessible from the main dashboard's Database View. An input file does not need to be loaded to access this functionality.

1. Navigate to the main dashboard, Database View.
2. Select **Lookup**.
3. Select the appropriate province using the **Province** drop-down. All cities in that Province will now be available in the City drop-down.

4. Select the appropriate city using the **City** drop-down. Once you have selected the city, the following information will appear in the tabs on the right:
 - a. All streets in that city in the **Street** tab. After choosing a street, select **Lookup**. You can also enter a specific street number to narrow the search results. After selecting **Lookup**, the results will be displayed in the Search Results box.
 - b. All large volume receivers for this city will be listed in the **LVR Name** tab. To see the address associated with an LVR, select the **LVR name** and then select **Lookup**. The results will be displayed in the Search Results box.
 - c. If there are alternate names for cities in this province, they will be listed in the **Alternate City Name** tab. Please note whether Canada Post considers the alternate name to be valid or invalid. A lookup function is not available for this tab.
 - d. If there are alternate names for streets in this city, they will be listed in the **Alternate Street Name** tab. To see the addresses associated with a specific alternate street name, select the street name then **Lookup**. The results will be displayed in the Search Results box.
5. When you are finished using the lookup feature, select **OK** or **Cancel** to exit.

Looking up an address using the Search By functionality

StreetSweeper Pro has an integrated lookup that will allow you to find or manually correct addresses using the Search By tool. This is accessible from the main dashboard's Database View. An input file does not need to be loaded to access this functionality.

1. Navigate to the main dashboard, Database View.
2. Select **Lookup**.
3. You can now enter an entire address or only specific components.
4. Select the **Search By** box for the address component you would like to search by. For example, if you would like to see all addresses associated with the postal code you entered, select the PC button under Search By.
5. Select the **Search** button to display the results in the Search Results box.
6. If you wish to update the address using information in Search Results, double-click the **correct** line.
7. If additional information is required to complete the address, a box will appear on screen. Enter the additional information and select **OK**.

8. When you are finished using the lookup feature, select **OK** or **Cancel** to exit.

Address and Postal Code Lookup

Current Lookup

PROVINCE: CITY:

STREET / PO BOX / RR #: STREET NAME:

POSTAL CODE: ORIGINAL ADDRESS:

SEARCH BY:

Street Name | LVR Name | Alternate City | Alt Street Name

ABBOTT

ADDISON HALL

ADENA MEADOWS

ALBERY

ALDER

ALEX BRODIE

ALEX GARDNER

ALGONQUIN

ALLAURA

ALLENVALE

Street # (optional)

Search Results Updating addresses cannot happen before correction

Street #	Suite #	Name	City	Postal	Other
1 to 1 Odd		DAVIS RD	AURORA	L4G2B4	
1 to 1 Odd	A to B	DAVIS RD	AURORA	L4G2B4	
2 to 12 Even		DAVIS RD	AURORA	L4G2B5	
3 to 17 Odd		DAVIS RD	AURORA	L4G2B4	
17 to 17 Odd	B to B	DAVIS RD	AURORA	L4G2B4	
18 to 18 Even		DAVIS RD	AURORA	L4G2B6	
19 to 45 Odd		DAVIS RD	AURORA	L4G2B4	
20 to 24 Even		DAVIS RD	AURORA	L4G2B6	
26 to 26 Even		DAVIS RD	AURORA	L4G2B6	
26 to 26 Even	B to B	DAVIS RD	AURORA	L4G2B6	
28 to 28 Even		DAVIS RD	AURORA	L4G2B6	
28 to 28 Even	B to B	DAVIS RD	AURORA	L4G2B6	

Data 2] CA: 02-16-2024 To 03-14-2024 Record Count: 5656

3 - File Importing & Mapping

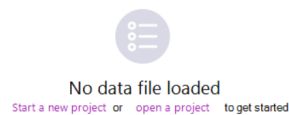
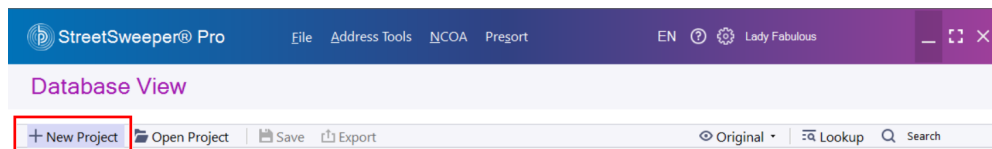
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Creating a project in StreetSweeper Pro

New users will learn how to create a new project file in StreetSweeper Pro. You will import a data file to start a new project.

1. Select **File > New Project**. You can also create a new project by clicking the **+New Project** icon from the dashboard. You will import a data file to start a new project.



(R) [Data 1] CA: 01-12-2024 To 02-15-2024
(Y) [Data 2] CA: 02-16-2024 To 03-14-2024

You can import a variety of different data formats into your project. These include:

- MS Access
 - MS Excel
 - Text files (.tab, .csv, fixed length)
 - DB2
2. When prompted by your browser, select your input file.
 - *MS Access or MS Excel input file*
 - *Text format input file*
 - *Fixed length input file*

MS Access or MS Excel input file

1. Select the table or worksheet you are using for your project.

Text format input file

1. Select your text file format.
2. Select your Character Set, if applicable.
3. Indicate whether your first row is a header row.
4. Indicate if all columns should be loaded as text.
5. Select **Continue**.

Fixed length input file

1. Select **Fixed Length fields** as the format of the text file.
2. Select your **Character Set**, if applicable.
3. Indicate whether your first row is a header row.
4. Indicate if all columns should be loaded as text.
5. Select **Continue**.
6. The application will attempt to auto-detect fixed length fields. Adjustments can be made using the field entry boxes on the right or by adjusting fields on the bottom display. There are options to enter fields by length and to load or save profiles.
7. When you are satisfied with the file setup, select **OK**.

Related topics

- [Setting up your Project in StreetSweeper Pro](#)

Setting up a Project

After opening your input file, the Field Mapping screen will appear. If your input file is MS Excel, click the checkbox beside **Remove Header Row**.

1. Under **Project Details**:
 - a. Enter the Project name if you do not want the default file name.
 - b. If required, select a Customer.

FIELD NAME	FIELD MAP TO	DATA HEADER	DATA_1	DATA_2	DATA_3	DATA_4	DATA_5
FIRST_NAME	F1	FIRST NAME	TIMOTHY EDWARD	CECILE	LINDSAY J	LEONA	
LAST_NAME	F2	LAST NAME	SIMON	AUDETTE	THOMAS	GLENN	
NAME_1	F3	COMPANY NAME					
NAME_2	ADDRESS_1	ADDRESS 1	228 POPLAR DR	43 RUE DES ANCESTRES	3205 TURNBERRY RD	700 BAY	
NAME_3	ADDRESS_2	ADDRESS 2					
ADDRESS_1	F6	ADDRESS 3					
ADDRESS_2	CITY	CITY	DARTMOUTH	SAINT-JEAN-SUR-RICHELIEU	BURLINGTON	SAULT S	
CITY	PROV	PROVINCE	NS	QC	ON	ON	
PROV	PST_CDE	POSTAL CODE	B2W4K5	J2W1R4	L7M4J4	P6A6L7	
PST_CDE	F10	CUSTOMER NUMBER	18435834008	12749988370	19749056112	1759334	
COUNTRY	F11	THICKNESS	1	1.25	1.75	1	
CITY_PROV	F12	WEIGHT	12	13	14	12	
CITY_PROV_PC	F13	FIRST NAME DUP	TIMOTHY EDWARD	CECILE	LINDSAY J	LEONA	
LANGUAGE	F14	LAST NAME DUP	SIMON	EVEREST	THOMAS	GLENN	
PCT_PC_LIST	F15	LANGUAGE	E	E	E	E	
	F16	DONATION	9163	68	2872	5279	

2. To split a combined first and last name field, select the appropriate **Split Name_1 Field** option.

FIELD NAME	FIELD MAP TO	DATA HEADER	DATA_1	DATA_2	DATA_3	DATA_4	DATA_5
FIRST_NAME	F1	FIRST NAME	TIMOTHY EDWARD	CECILE	LINDSAY J	LEONA	
LAST_NAME	F2	LAST NAME	SIMON	AUDETTE	THOMAS	GLENN	
NAME_1	F3	COMPANY NAME					
NAME_2	ADDRESS_1	ADDRESS 1	228 POPLAR DR	43 RUE DES ANCESTRES	3205 TURNBERRY RD	700 BAY	
NAME_3	ADDRESS_2	ADDRESS 2					
ADDRESS_1	F6	ADDRESS 3					
ADDRESS_2	CITY	CITY	DARTMOUTH	SAINT-JEAN-SUR-RICHELIEU	BURLINGTON	SAULT S	
CITY	PROV	PROVINCE	NS	QC	ON	ON	
PROV	PST_CDE	POSTAL CODE	B2W4K5	J2W1R4	L7M4J4	P6A6L7	
PST_CDE	F10	CUSTOMER NUMBER	18435834008	12749988370	19749056112	1759334	
COUNTRY	F11	THICKNESS	1	1.25	1.75	1	
CITY_PROV	F12	WEIGHT	12	13	14	12	
CITY_PROV_PC	F13	FIRST NAME DUP	TIMOTHY EDWARD	CECILE	LINDSAY J	LEONA	
LANGUAGE	F14	LAST NAME DUP	SIMON	EVEREST	THOMAS	GLENN	
PCT_PC_LIST	F15	LANGUAGE	E	E	E	E	
	F16	DONATION	9163	68	2872	5279	

3. If you are using a saved Profile, select from **Profile**.

4. Identify the fields in your file by dragging the appropriate Field Name from the left column to the first field of the displayed data. Where possible, StreetSweeper Pro has identified address fields.
 - a. If you drop a field in the wrong location, drag it back to the left column.
 - b. To merge two fields together, drop the same **Field Name** onto two different data rows.
 - c. Use the scroll bars to see more of your data.
5. When your fields have been identified, select **OK**. If any of your fields have been merged, you will be asked to drag them into the correct order.

Merging multiple fields in your database

Merging fields allow you to create a single address line if your database has address components split into several fields. It will also allow you to merge complete address lines to meet the 2 line Canada Post maximum.

1. After opening your file, the Field Mapping screen will appear. Drag the appropriate Field Name beside the first corresponding field in your input database.
2. Drag the same Field Name beside the second corresponding field in your input database.
3. Continue to drag the field name beside corresponding fields until all fields have been identified with the correct Field Name.
4. Once all fields have been mapped, select **OK**.
5. A box will appear prompting you to indicate the order of the fields you have selected. Each field will be separated by a space in the final, combined field.
6. Drag the fields until they are in the correct order and select **Done**. If you have inadvertently mapped more than one field with the same Field Name, select **Cancel** to return to the Field Mapping screen and make corrections.

Merging two or more databases in StreetSweeper Pro

After creating a job, you can merge additional databases into your Project.

1. After creating your Project, select **File > Merge into Project**.

StreetSweeper® Pro File Address Tools NCOA Pregort EN Lady Fabulous

Database View

+ New Project Open Project Save

File Menu:

- New Project Ctrl+N
- Open Project Ctrl+O
- Merge into Project Ctrl+M**
- Save Ctrl+S
- Save as ...
- Reports
- Export File
- Logout
- Exit

ID	FNAM	LNAM	CITY	PROV	PC	PAL_CON_BUI	DMC
1	FIRST NAME	LAST NA					
2	TIMOTHY E...	SIMON	DARTMOUTH	NS	B2W4K5		
3	CECILE	AUDETT	SAINT-JEAN	QC	J2W1R4		
4	LINDSAY J	THOMAS	BURLINGTON	ON	L7M4J4		
5	LEONA	GLENN	SAULT STE...	ON	P6A6L7		
6	COURTNEY B	SWANN	AYR	ON	N0B1E0		
7	STEPHEN J.	WAKEMAN	WAKEMAN 7...	46 ROCKY RI...	CALGARY	AB	T3G4E5
8	COLLEEN	MAYES	MAYES 6386	9906-158 ST...	EDMONTON	AB	T5P2X5
9	LOUISE HEL	GRENER	GRENER 29...	8270 RUE D...	SAINT-LEON...	QC	H1P2E7
10	JOYCE M	MASON	MASON 8987	PO BOX 109	STELLARTON	NS	B0K1S0
11	JEAN G	PARSONS	PARSONS 6...	RR 1 BOX 4 ...	BRYANTS C...	NL	A0A3P0
12	FRANCOIS F	THIBODEAU	THIBODEAU...	98 CH DE LA ...	LA MALBAIE	QC	G5A1E5
13	DONALD R	SKINNER	SKINNER 1357	PO BOX 43	CARBONEAR	NL	A1Y1B5
14	HEATHER L	MUIR	MUIR 1587	654 NORTH ...	QUESNEL	BC	V2J1Z6
15	HEATHER L	MUIR	MUIR 1587	654 NORTH ...	QUESNEL	BC	V2J1Z6
16	SYLVIE S	GIRARD	GIRARD 9136	106 STE-GE...	QUEBEC	QC	G2B4K4
17	PIERRE	MARTINEAU	MARTINEAU...	530 PAPINEA...	ABBOTSFO...	QC	J0E1A0
18	KERWIN	SUTTON	SUTTON 1404	9017 136B ST	SURREY	BC	V3V7P1

Showing 1 to 20 of 5656

Project: aaaNew_demoListvwt.3
NCOA Credits: 10000
Record Count: 5656

2. When prompted by your browser, select your next input file.

StreetSweeper® Pro File Address Tools NCOA Pregort EN Lady Fabulous

Database View

+ New Project Open Project Save Export

Select Appropriate Table

Table Name	Count
Customer Lists	5656
Postal Code lists	500

Done Cancel

(R) [Data 1] CA: 01-12-2024 To 02-15-2024
(Y) [Data 2] CA: 02-16-2024 To 03-14-2024

3. Continue by entering the Project Details for this input file and select **OK**.
4. Repeat this process for each input file.

Merging suppression files into your project

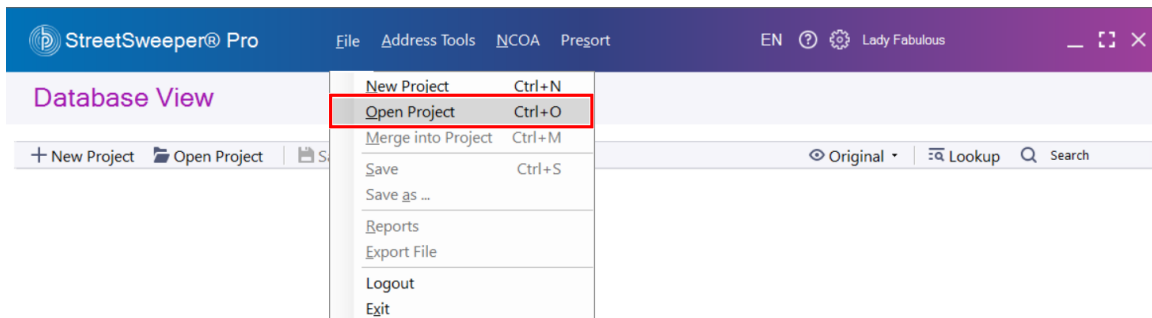
If you wish to suppress records in your project, you will need to import one or more suppression files. The order in which you import files is not important. You will identify suppression file(s) prior to purging your project. Merging suppression files is the same process as merging two or more databases.

1. After creating your Project with an initial file, select **File>Merge into Project**.
2. When prompted by your browser, select your suppression file.
3. Continue by entering the **Project Details** for this suppression file and select **OK**.
4. Repeat this process for each suppression file.

Opening an existing project

You can open previously saved Projects to continue working.

1. Select **File > Open Project**. You can also access existing projects by clicking the **Open Project** icon from the dashboard.

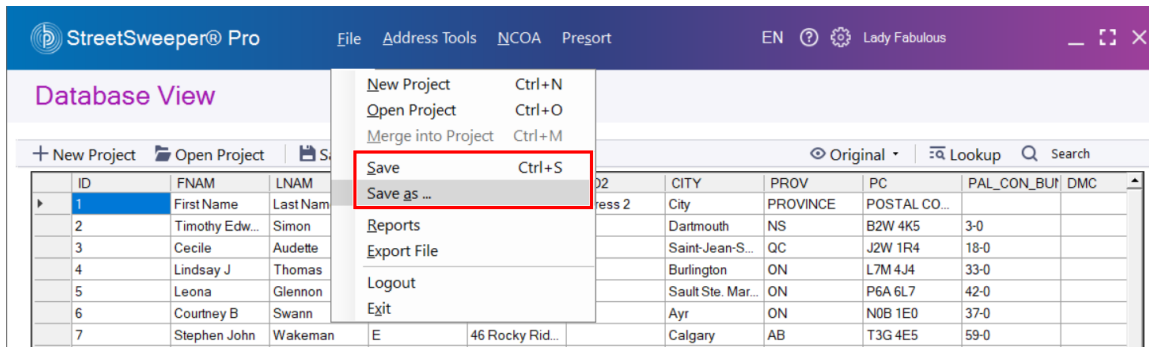


2. When prompted by your browser, select your Project file.

Saving a Project in StreetSweeper Pro

You can save your Project with a user-selected or default filename.

1. Select **File > Save** or **File > Save As**.

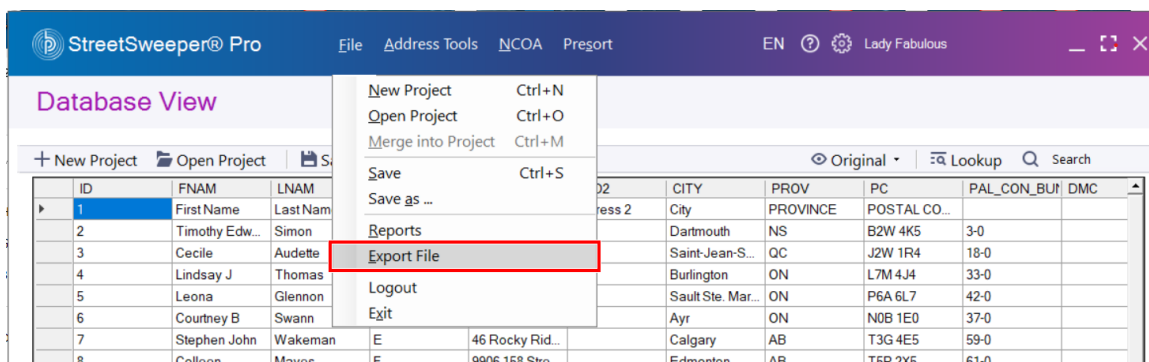


2. When prompted by your browser, select your destination folder. Enter a filename or keep the default name assigned by the application.
3. Select **Save**.

Exporting your Project file

You can export your Project file at any point.

1. Select **Presort > Export File**.



2. Choose the fields you wish to have exported in your file by checking the appropriate boxes under **Select Information**.
3. Choose the type of records to include in your export file by selecting the relevant status codes in the **Filter Records By** box. Uncoded records (foreign or with a missing or invalid postal code) can be excluded from the file by checking the **Exclude Uncoded** box.
4. If you have run NCOA and/or CMA processing on your file, you can select the types of records to export by checking the appropriate options in the **NCOA** box.
5. If you have presorted your file, you can export your file in presort order by ensuring the **Presort Sequence** box has been checked under Presort Data.

6. Select the format of your export file using the drop-down under **Output Format**. If you wish to export duplicate fields, ensure **Output Duplicate Fields** is checked.
7. If you have selected a flat file export format (csv, tab, fixed length, specified delimiter), you can select the appropriate character set using the options in the **Character Set** box.
8. When you are satisfied with the options you have selected, select **OK**. Choose an output folder and filename to save your file.

4 - Address Correction

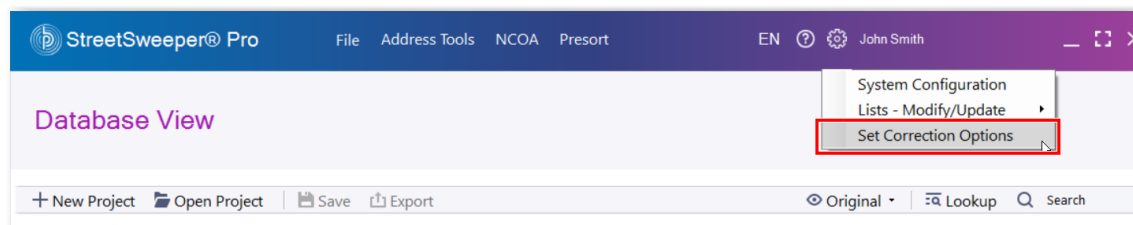
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Setting up default options for correcting Projects

Users can set standard options for correction processing of Projects. These defaults can be overridden for a specific Project by changing the options prior to correction. These changes will not update the default options.

1. Select the **Settings** icon and select **Set Correction Options**.



2. Indicate what type of processing should be applied to Projects. The default is **Correction/Validation**. If **Validation Only** is selected, no corrections will be made to Projects.
3. Indicate how records should be cased during processing.
4. Check **Shorten Address** if Canada Post approved abbreviations should be used for street types and directions.
5. Check **French Accents** if these should be applied during processing.
6. Indicate how unit information should be displayed within the address block. Units can be displayed before the street address, also known as Western Style, or use a keyword such as unit or suite.
7. Check **Add Postal Code** space to ensure all valid and corrected Postal Codes have a space between the first three and last three characters.
8. Check **Format Valid** if valid records should also have the selected formatting options applied.
9. Check **Validate Rural Based Only on Postal Code** if correction on these records should only consider the Postal Code.
10. Check the appropriate language option to specify if records should be corrected to English, French, or a combination of both.
11. Check **Display address accuracy statement after correction/validation** to have the Statement of Accuracy automatically open after processing is complete.

When you have completed setting your default options, select **OK** to save them. You can return at any time to modify your default settings.

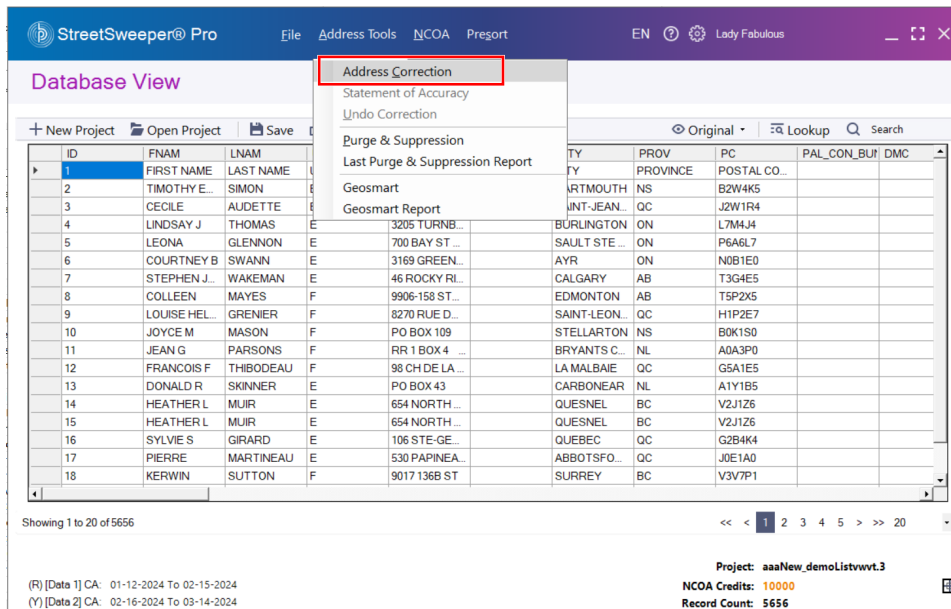
Viewing the statement of accuracy

If **Display address accuracy statement after correction/validation** was selected as a correction option, the Statement of Accuracy will automatically open after processing is complete. It can also be opened by selecting **Address Tools > Statement of Accuracy**.

Correcting a project

After creating a Project, you can correct and validate address records.

1. Select **Address Tools > Address Correction**.



2. Default options will be shown. Any of these options can be changed for this Project only. Changes made on this screen will not override the existing defaults.
3. If you would like a customer name displayed on the report, select the appropriate customer from **Mailing on Behalf Of**. Customers displayed here were set up under **Settings > System Configuration** and **Options > Customer List**.

When you have completed setting your options, select **OK** to process your Project.

Displaying your Address Accuracy Statement

After processing your Project through address correction and validation, the Address Accuracy Report will automatically be created as a PDF file. If you have selected the option to **Display address accuracy statement after correction/validation**, it will automatically open on your screen once correction/validation processing is complete.

1. After correction/validation processing is complete, select **File > Reports > Address Correction > Address Accuracy Report**. Select **OK** to open the PDF copy of your Address Accuracy Statement.
2. Once the Address Accuracy Statement displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the Address Accuracy Statement.

Displaying your Address Accuracy Statement automatically

After processing your Project through address correction and validation, the Address Accuracy Report will automatically be created as a PDF file.

1. To set up your Project corrections, see [Setting up default options for correcting Projects in StreetSweeper Pro](#).
2. Check the box beside **Display address accuracy statement after correction/validation** to automatically open the Statement of Accuracy after processing is complete.
3. Once the Address Accuracy Statement displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
4. Select **Print** from your PDF viewer to print the Address Accuracy Statement.
5. To review your Address Accuracy Statement at any time after correction processing, select **File > Reports > Address Correction > Address Accuracy Report**. Select **OK** to open the PDF copy of your Address Accuracy Statement.

Related topics

- [Setting up default options for correcting Projects in StreetSweeper Pro](#)

Understanding the address status codes

The address status code helps you know what was corrected, as well as providing information on errors in the address. The address status code is in the CORRECT field.

Here are examples of codes you might see:

- V-LV-RF
- C-LB-SN-ST
- N-UR-SN-PC

The first character of the code indicates the correction status of the address:

- **V**: Valid address
- **C**: Corrected address
- **N**: Invalid address

In addition, an invalid address will have at least one of these codes:

- **??**: Unknown address
- **AB**: Municipal Abbreviation
- **AL**: Address information will not fit the defined length
- **B#**: PO Box number
- **BK**: PO Box Keyword
- **C#**: Street (Civic) number
- **DI**: Delivery Information (STN MAIN)
- **DN**: Delivery Name
- **GK**: General Delivery Keyword
- **IN**: International
- **IP**: Invalid Punctuation
- **LB**: Business Building
- **LR**: Apartment Building
- **LV**: Large Volume Receiver (LVR)
- **MA**: Municipal Alternate
- **ML**: Municipality will not fit the defined length
- **MN**: Municipal Name
- **PC**: Postal Code
- **PR**: Province
- **R#**: Route Number

- **RF:** Valid address that has been reformatted
- **RK:** Route Keyword
- **RU:** Rural Address
- **RU-??:** Valid rural postal code, address information could not be validated
- **S#:** Suite Number
- **SA:** Alternate Street Name (Valid)
- **SD:** Street Direction
- **SK:** Suite Keyword
- **SM:** Suite Number Missing (Apartment building or business building)
- **SN:** Street Name
- **ST:** Street Type
- **UK:** United Kingdom Address
- **UR:** Urban Address
- **US:** United States Address

Related topics

- [Correcting a project](#)
- [Manually resolving invalid addresses in your database](#)

Manually resolving invalid addresses in your database

StreetSweeper Pro has an integrated lookup that will allow you to access additional address information that may allow you to manually correct invalid addresses in your Project. This is accessible from the main dashboard's Database View.

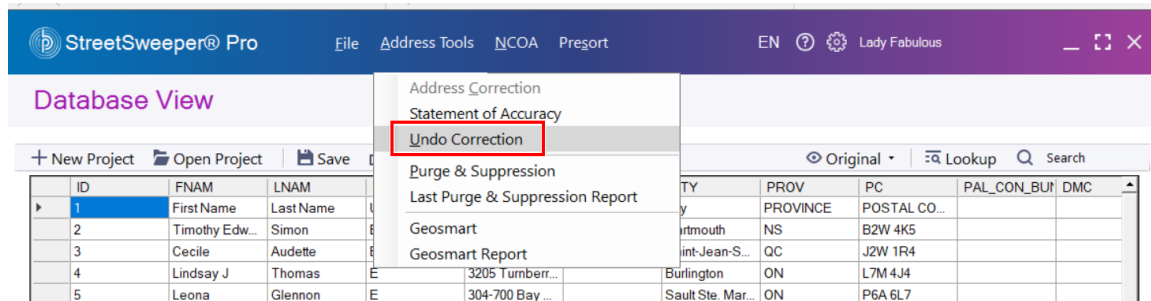
1. After processing your Project through correction/validation, navigate to the main dashboard.
2. Change the filtering option from **Original** to **Invalid**. The database view will now display only records marked as invalid by StreetSweeper Pro
3. Select the record you would like to manually resolve.
4. Select **Lookup**. The address will now be displayed on the **Address and Postal Code Lookup** window.
5. Select the address component you would like to search. For example, if you would like to see all addresses associated with your record's postal code, select the PC button under Search By.
6. Select the **Search** button to display the results in the Search Results box.
7. If you wish to update your address using information in Search Results, double-click the **correct** line.

8. If additional information is required to complete the address, a box will appear on screen. Enter the additional information and select **OK**.
9. A confirmation box will appear. If the information is correct, select **Yes**. The Original Address box will now display the updated information in red.
10. You can navigate through your addresses using the >> and << buttons.
11. To update manual changes in your Project, select **OK**.
12. If your addresses are now correct, they will no longer appear in the list of invalid addresses in the Database View. Your Statement of Accuracy will also be updated.

Reprocessing correction for a Project

If you need to reprocess correction for a Project, you must first undo any NCOA, CMA and/or presort processing that has been performed.

1. Select **Address Tools > Undo Correction**.



2. Select **Yes** when the warning message appears.

Purging Duplicate Records from a Project

Duplicate records can be identified and removed from a Project. Criteria used to determine if two records are duplicates is set by the user. Duplicate records will be identified and purged from all files merged into your Project. To use a suppression file, please review [Removing Records Based on a Suppression File](#).

1. Select **Address Tools > Purge & Suppression**.
2. Check the fields that will be used by the application to match duplicate records. By default, **Address Line 1**, **Address Line 2**, **Province**, and **Postal Code** are checked. These can be removed if address fields will not be used to match records.

3. Select the options that will be used to identify duplicates:
 - a. If fields must match exactly, select **Exact Match on Name**.
 - b. If fields must be close but not an exact match to be identified as a duplicate, select **Near Match on Name**.
 - c. If rural postal codes and rural route addresses should not be identified as duplicates, check this box. This is helpful if the Project contains a high number of RR or GD addresses rather than civic-style addresses.
4. Select how results are handled by checking the appropriate **Result Options**.
 - a. To have purge results display on a separate screen after processing is finished, select **Display results when complete**.
 - b. To automatically delete duplicate records after processing, select **Remove marked items from database**.
 - c. To create an export file with duplicate records, select **Export marked items from database**.
 - d. To print the purge report, select **Print report**.
5. When you have completed setting your options, select **OK** to start the purge process.

After the purge process is complete, you will be returned to the main dashboard. The database view will be filtered to show only duplicate records. Additional information on duplicate records is displayed in the **IsDupe** and **Dupes** fields. Navigate to these fields by scrolling the database view to the right.

Displaying your purged records report

After purging duplicate records from your Project, the report is always available through the central reports screen.

1. After purging records in your Project, select **File > Reports > Data Management > Last Purge this Session**. Select **OK** to open the PDF copy of your report.
2. Once the report displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the report.

Removing records based on a suppression file

A suppression file can be used to identify and remove records from a Project. Criteria used to determine if a record matches one in the suppression file is set by the user.

To use suppression files, you must merge them into your Project. Please review [Merging Two or More Databases](#).

1. Select **Address Tools > Purge & Suppression**.
2. Check the fields that will be used by the application to match records to those in the suppression file. By default, **Address Line 1**, **Address Line 2**, **Province**, and **Postal Code** are checked. These can be removed if address fields will not be used to match records.
3. Select the options that will be used to identify matches:
 - a. If fields must match exactly, select **Exact Match on Name**.
 - b. If fields must be close but not an exact match to be identified as a duplicate, select **Near Match on Name**.
 - c. If rural postal codes and rural route addresses should not be identified as duplicates, check this box. This is helpful if the Project contains a high number of RR or GD addresses rather than civic-style addresses.
4. Select how results are handled by checking the appropriate **Result Options**.
 - a. To have suppression results display on a separate screen after processing is finished, select **Display results when complete**.
 - b. To automatically delete records that are to be suppressed, select **Remove marked items from database**.
 - c. To create an export file with suppressed records, select **Export marked items from database**.
 - d. To print the suppression report, select **Print report**.
5. The final file merged into a Project is the default suppression file. To change this file, select the **Change Suppression File** button, identify the correct file, and click the **Select** button.
6. When you have completed setting your options, select **OK** to start the suppression process. The suppression file will be automatically removed from your Project after processing.
7. If you have additional suppression files, repeat the process from step 2 for each suppression file.

After the suppression process is complete, you will be returned to the main dashboard. The database view will be filtered to show only suppressed records.

Displaying your suppressed records report

After suppressing records in your Project, the report is always available through the central reports screen.

1. After suppressing records in your Project, select **File > Reports > Data Management > Last Purge this Session**. Select **OK** to open the PDF copy of your report.
2. Once the report displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the report.

5 - Presort

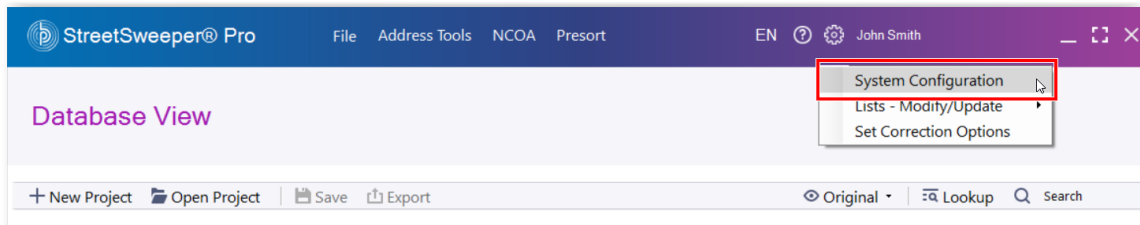
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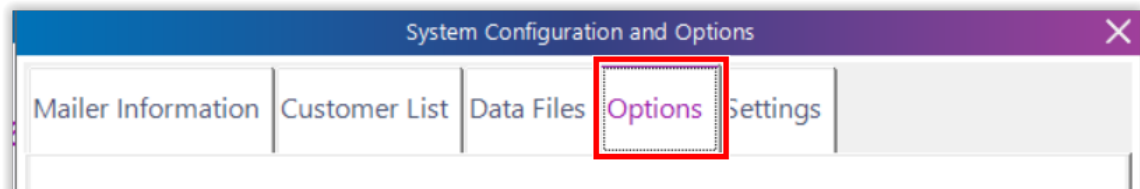
Setting default presort options

StreetSweeper Pro has default presort settings. These settings can be customized to your needs.

1. Select the **Settings** icon then **Settings > System Configuration**.



2. Select the **Options** tab.



3. Set one or more of the following options:
 - **Break String On:** select if the break indicator should appear on the first piece, last piece, or both the first and last piece of the project's bundles, containers, or pallets.
 - **Bundle string:** "*" is used as the default. To change this, enter another character.
 - **Container string:** "*" is used as the default. To change this, enter another character.
 - **Pallet string:** "P" is used as the default. To change this, enter another character.
 - **City string:** "!!" is used as the default. To change this, enter another character.
 - **Container/Bundle column add bundle breaks:** the default is to include bundle breaks on your print file. If you do not want bundle breaks, check this option.
 - **OEL stars on front and end of bundle:** the default is for OEL stars to only be added to the front of a bundle. to add OEL stars at both the front and end of a bundle, check this box.
 - **OEL Number of stars:** the default is 2 stars. To change this, enter another number.
4. Select **Update** to save your changes.

Presorting your project

The presort process will prepare your mailing to be eligible for postal discounts.

1. Select **Presort > Presort**. If you are using a saved Profile, select using the drop-down above the Save and Delete buttons.
2. Using the calendar tool under Drop Date, enter the day you intend to bring the mail to a Canada Post depot.
3. If applicable, select the appropriate customer or enter the customer's account and contract numbers manually. Clicking the + button will allow you to enter new customer information directly from this screen.
4. Using the checkboxes, select which types of addresses you want to include in the presort. If the box is not checked, these addresses will be flagged as unencoded.
5. Select **Additional Options**, as appropriate.
6. Using the drop-down, select the **Residue Office**. This is Canada Post depot that you will be taking the mail. If the depot is not listed, you can use the + button to add the location.
7. Select your **Mail Type** from the drop-down.
8. Select your **Piece Size** from the drop-down. The container type will be automatically selected based on the piece size.
9. If you will be using pallets or monotainers, select the appropriate option. If you will be brick piling, check this box.
10. Enter in the Measurements of your mail piece. The bundle and container maximums are calculated based on the piece weight and thickness. These values can be adjusted if required. **NOTE:** Length and width are only required if you are brick piling.
11. If you wish to save these specifications as profile, click **Save** under the Profile drop-down.

- When you are satisfied with the options, click **Proceed** to process your project.

StreetSweeper® Pro File Address Tools NCOA Presort EN Lady Fabulous

Database View

Pre Sort

+ New Proj

DROP DATE: 2024-01-26 PROJECT NAME: aaaNew_demoListvwvt.3

CUSTOMER: Fabulous Corp. CUSTOMER #: 1234567 CONTRACT #:

RESIDUE OFFICE: LOJ9Z0 - MISSISSAUGA ON Container Type: LT-Letterflatainer(LFT) Flats Tub

MAIL TYPE: Personalized Mail Machineable

PIECE SIZE: STANDARD

Measurements

WEIGHT: 10 g THICKNESS: 5 mm BUNDLE MAX: 20

LENGTH: 140 mm WIDTH: 100 mm CONTAINER MAX: 78

Include these addresses in Presort

Invalid Questionable Retired Postal Codes

Additional Options

Treat Uncoded as Residue J Tag

Brick Piling

Brick Pile CPC Approval for Residue

PALLETS MAX:

Profile

New Profile

Save Delete

Proceed Cancel

Showing 1 to 20

(R) [Data 1] CA: 01-12-2024 To 02-15-2024
(Y) [Data 2] CA: 02-16-2024 To 03-14-2024

Project: aaaNew_demoListvwvt.3
NCOA Credits: 10000
Record Count: 5656

- When the presort is complete, your Mailing Summary will appear on screen.

Creating a presort profile

If you have a regular presort project to complete, you can save the parameters and reuse them.

- For instruction on presorting your Project, see Presorting your Project in StreetSweeper Pro.
- After setting up the required parameters, select **Save** under the Profile option.

3. In the **Profile Name** box, enter a name for your profile and select **OK**.

The screenshot shows the 'Pre Sort' application window. A 'Profile Name' dialog box is open in the foreground. The dialog box contains the text 'Enter a name for your profile' and a text input field with 'Profile 88' entered. The 'OK' button is highlighted with a red rectangle. The background window shows various fields for project configuration, including 'DROP DATE', 'PROJECT NAME', 'CUSTOMER', 'CONTRACT #', 'RESIDUE OFFICE', 'MAIL TYPE', 'PIECE SIZE', 'Measurements', 'Include these addresses in Presort', 'Additional Options', 'Brick Piling', 'Pallet Max', and 'Profile'.

4. Select **OK** to acknowledge the profile has been created.
5. Select **Proceed** to process your project. The next time you enter the Presort screen, your profile will be available.

Related Topics

- Presorting your Project in StreetSweeper Pro

Presorting your Project using a saved profile

If you have saved a profile for a regular presort job, you can select the profile to pre-populate the fields on the presort screen.

1. Select **Presort > Presort**.
2. Using the drop-down under the **Profile** option, choose your required profile.

The screenshot shows the 'Pre Sort' dialog box with the following fields and options:

- DROP DATE:** 2024-02-08
- PROJECT NAME:** aaaNew_demoListwvt.3
- CUSTOMER:** Fabulous Corp.
- CUSTOMER #:** 1234567
- CONTRACT #:** (empty)
- Include these addresses in Presort:**
 - Invalid
 - Questionable
 - Retired Postal Codes
- Additional Options:**
 - Treat Uncoded as Residue
 - J Tag
- RESIDUE OFFICE:** L0J9Z0 - MISSISSAUGA ON
- Container Type:**
 - LT-Letterflatainer(LFT)
 - Flats Tub
- Pallets:**
 - None
 - Pallets
 - Monotainers
- Brick Piling:**
 - Brick Pile
 - PALLET MAX:** (empty)
 - CPC Approval for Residue
- MAIL TYPE:** Personalized Mail Machineable
- PIECE SIZE:** STANDARD
- Measurements:**
 - WEIGHT:** 3 g
 - THICKNESS:** 5 mm
 - BUNDLE MAX:** 20
 - LENGTH:** 140 mm
 - WIDTH:** 150 mm
 - CONTAINER MAX:** 78
- Profile:** SORT67 (dropdown menu open, showing 'New Profile' and 'SORT67' options)
- Buttons:** Proceed, Cancel

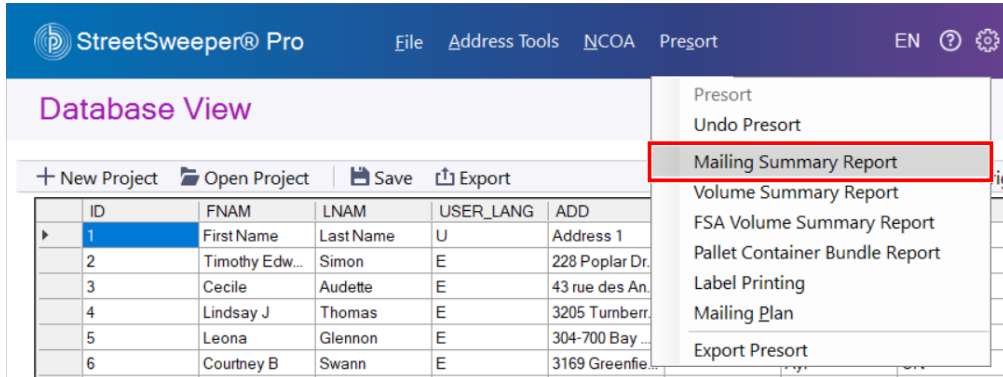
3. Select **Proceed** to process your project.

Creating and printing the Mailing Summary

After presorting your Project, the Mailing Summary will automatically be created as a PDF file and displayed on screen.

1. Once the **Mailing Summary** displays on screen, select Save or Save As from your PDF viewer. Select the appropriate folder to save the file.
2. Select **Print** from your pdf viewer to print the Mailing Summary.
3. To review your Mailing Summary at any time after presorting, select **File > Reports** and check the box beside **Mailing Summary** in the **Presort** section. Select **OK** to open the PDF copy of your Mailing Summary.

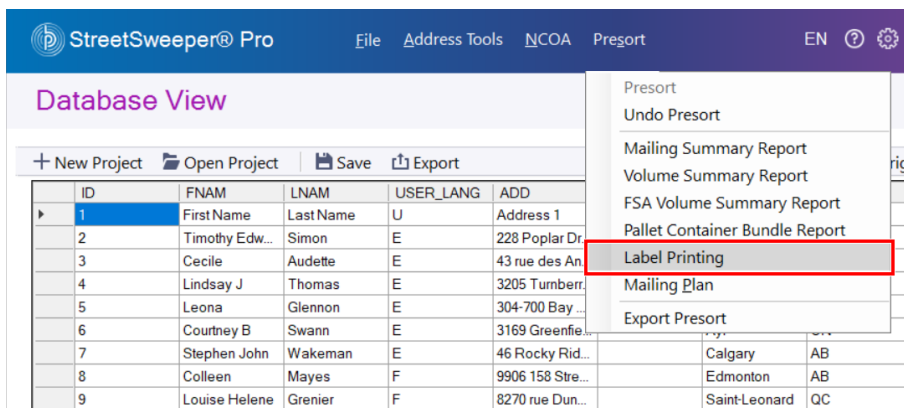
- To regenerate the Mailing Summary, select **Presort > Mailing Summary Report**. Select **OK** to overwrite the previous report or rename the PDF file.



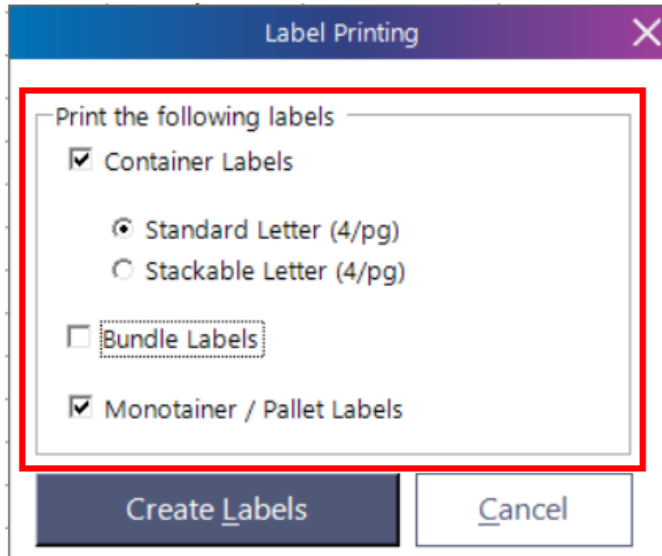
Creating and printing presort labels

After presorting your Project, container, and bundle labels will automatically be created. If you have chosen to use monotainers or pallets, these labels will also be created automatically. All labels are created as pdf files.

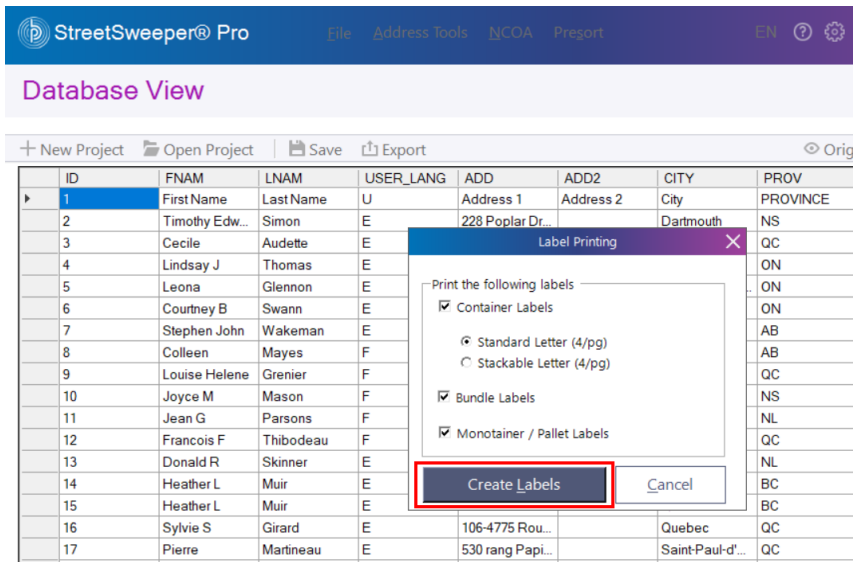
- Select **Presort > Label Printing**.



- Click the check boxes beside each type of label you wish to create. Container labels can be created in a standard format or stackable.



- Select **Create Labels**.

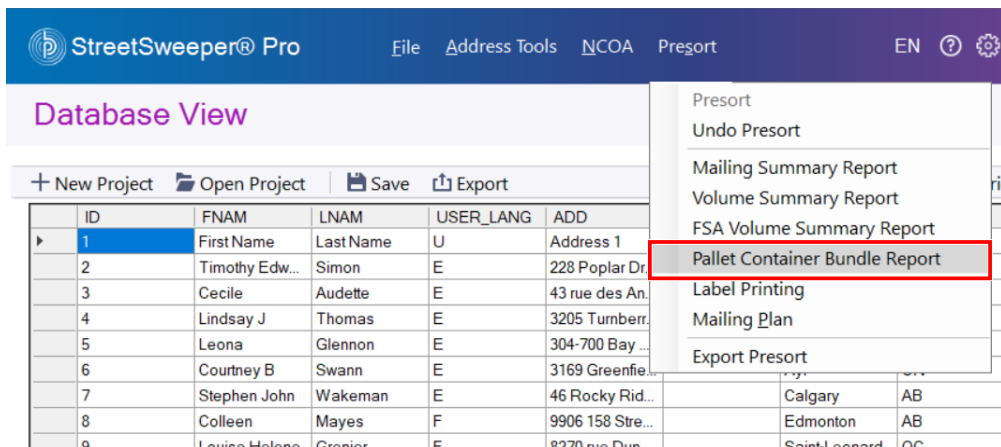


- Once the label files display on screen, select each to **Save** or **Save As** from your PDF viewer. Select the appropriate folder to save the files.
- Select **Print** from your PDF viewer to print your label file.
- To regenerate labels, select **Presort > Label Printing > Create Label**. Select **OK** to overwrite the previous labels or rename the PDF files.

Creating and printing the Pallet Container Bundle Report

After presorting your Project, the Container and Bundle Report will automatically be created as a PDF file. This lists the details of the bundles in each container. If monotainers or pallets were selected, the report will also list the details of the containers on each monotainer or pallet.

1. To generate the report, select **Presort > Pallet Container Bundle Report**.

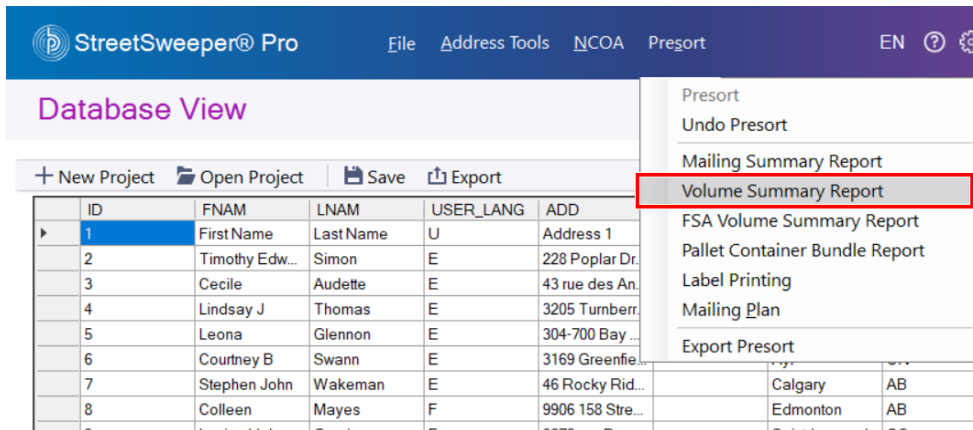


2. Once the Container and Bundle Summary displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the Container and Bundle Summary.
4. To review your Container and Bundle Summary at any time after presorting, select **File > Reports** and check the box beside **Pallet Container Bundle Details** in the Presort section. Select **OK** to open the PDF copy of your Container and Bundle Summary.
5. To regenerate the Container and Bundle Summary, select **Presort > Pallet Container Bundle Report**. Select **OK** to overwrite the previous report or rename the PDF file.

Creating and printing the Delivery Office Volume Summary

After presorting your Project, the Delivery Office Volume Summary will automatically be created as a PDF file. This lists the number of containers and mail pieces that will be distributed by Canada Post to each delivery office.

1. Select **Presort > Volume Summary Report** to generate this report.



2. Once the **Delivery Office Volume Summary** displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the Delivery Office Volume Summary.
4. To review your Delivery Office Volume Summary at any time after presorting, select **File > Reports** and check the box beside **Volume Summary** in the Presort section. Select **OK** to open the PDF copy of your Delivery Office Volume Summary.
5. To regenerate the Delivery Office Volume Summary, select **Presort > Volume Summary Report**. Select **OK** to overwrite the previous report or rename the PDF file.

Creating and printing the FSA Volume Summary Report

After presorting your Project, the FSA Volume Summary will automatically be created as a PDF file. This lists the number of pieces that will be delivered to each forward sortation area (first three characters of the postal code).

1. To generate the report, select **Presort > FSA Volume Summary Report**.
2. Once the FSA Volume Summary displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the FSA Volume Summary.
4. To review your FSA Volume Summary at any time after presorting, select **File > Reports** and check the box beside **FSA Volume Summary** in the Presort section. Select **OK** to open the PDF copy of your FSA Volume Summary.
5. To regenerate the FSA Volume Summary, select **Presort > FSA Volume Summary Report**. Select **OK** to overwrite the previous report or rename the PDF file.

Creating your Canada Post mailing plan for upload

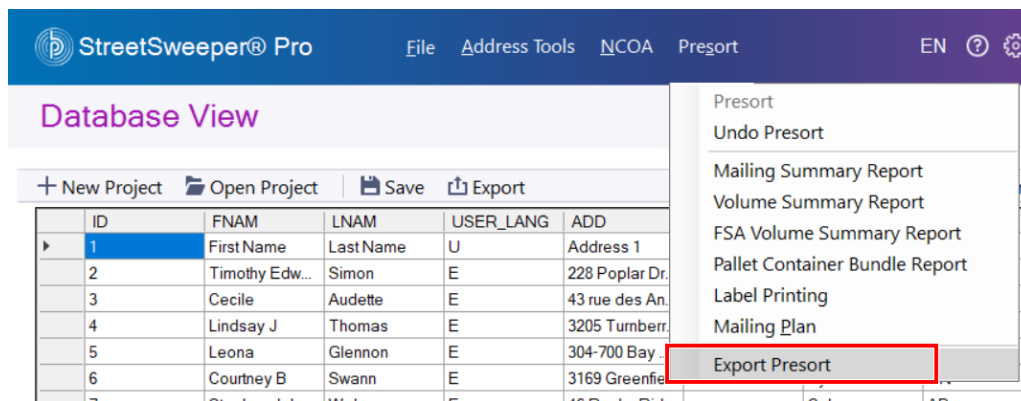
Certain Special Handling presorts require the creation of a mailing plan for uploading to the Canada Post electronic shipping tools. The mailing plan is automatically created as a zip folder when your Project is processed. If you reprocess your file, the new mailing plan will overwrite the old mailing plan.

1. Run presort on your Project using the instructions for Presorting your Project.
2. Once completed, your mailing plan will automatically be created and saved to the location specified under **Settings > System Configuration > Data Files > File Output**. The zip file default name will be **projectname_est.zip**.

Exporting your presort print file

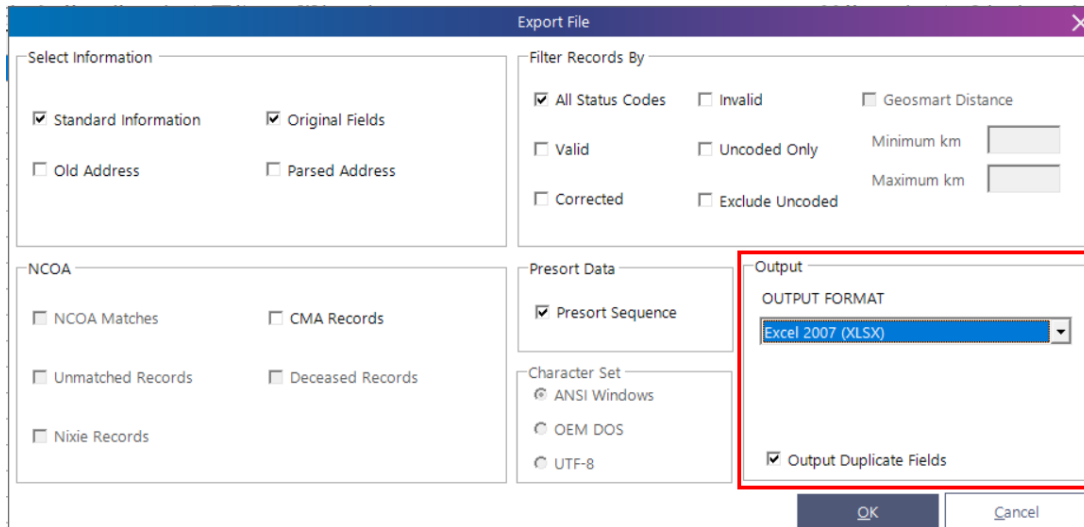
After presorting your Profile, you can export the results for printing. If required by Canada Post, this process will also create the Mailing Plan for uploading into Canada Post's shipping tools.

1. Select **Presort > Export Presort**.



2. Choose the fields you wish to have exported in your file by checking the appropriate boxes under **Select Information**.
3. Choose the type of records to include in your export file by selecting the relevant status codes in the **Filter Records By** box. Uncoded records (foreign or with a missing or invalid postal code) can be excluded from the file by checking the **Exclude Uncoded** box.
4. If you wish your file to be exported in presort order, ensure the **Presort Sequence** box has been checked under Presort Data.

- Select the format of your export file using the drop-down under **Output Format**. If you wish to export duplicate fields, ensure **Output Duplicate Fields** is checked.



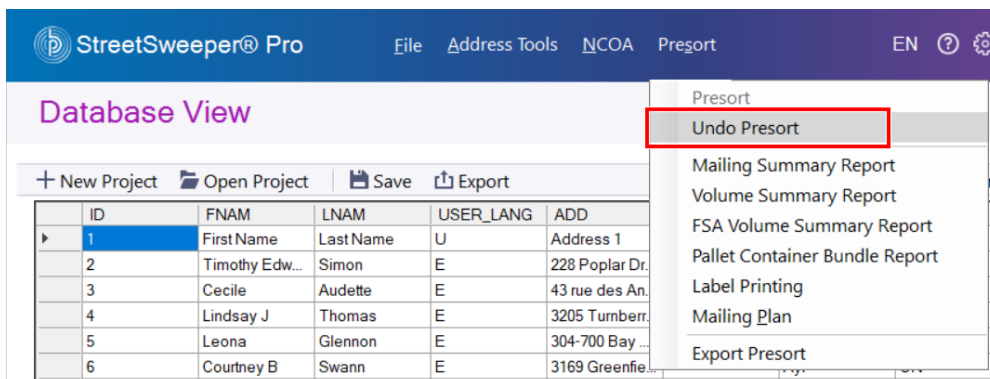
- When you are satisfied with the options you have selected, select **OK**. Choose an output folder and filename to save your file.

Undoing your presort processing

You can reverse the presort processing on your Project and remove the information generated in the relevant presort fields.

IMPORTANT: If you reverse your presort processing and wish to sort again, you must overwrite all previous reports and container labels for this Project as the EST number will no longer be valid.

- Select **Presort > Undo Presort**.



2. Acknowledge the warning and select **Yes** to reverse presort processing on this Project.

6 - Canadian Marketing Association (CMA)

Suppression

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Flagging and removing the Canadian Marketing Association's do not mail addresses

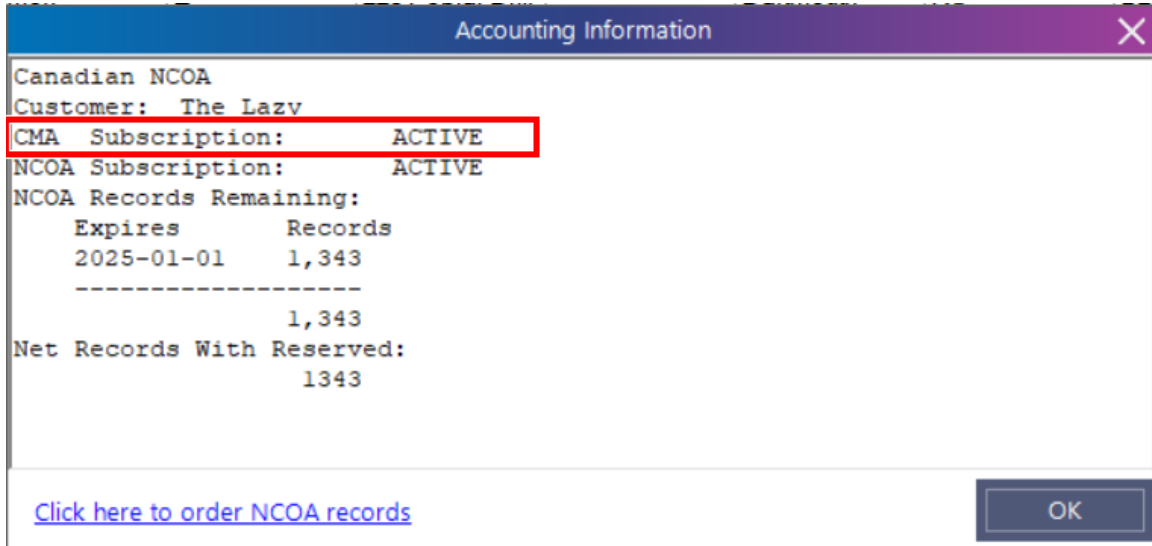
This service requires an additional annual subscription. Please contact your Pitney Bowes sales representative to add this license to StreetSweeper Pro.

1. Select **NCOA > Process CMA Only**.
2. Verify that name fields have been appropriately identified. CMA processing requires an individual's first and last name or a company name.
3. Under **Options**, select how you would like to have your records matched to the CMA data.
 - a. **Match All Name Fields** will use the mapped name information plus address.
 - b. **Match Last Name Only** will use the mapped last name information plus address.
 - c. **Match Address Only** will ignore name fields and only match to the address.
4. The default option is to have all matching records purged automatically after processing. If you prefer to see the results prior to purging, uncheck **Purge CMA** under **Options**.
5. Select **Proceed** to start CMA processing.

Checking the status of your CMA account

Using this option, you can see if your CMA module has an active license. If you do not have an active license, please contact your Pitney Bowes sales representative.

1. Select **NCOA > Account Status**.
2. If you have a valid CMA module license, your **CMA Subscription** will be listed as **ACTIVE**.



3. Select **OK** to exit this screen.

Displaying your CMA suppression report

After running CMA suppression on your Project, the report is always available through the central reports screen.

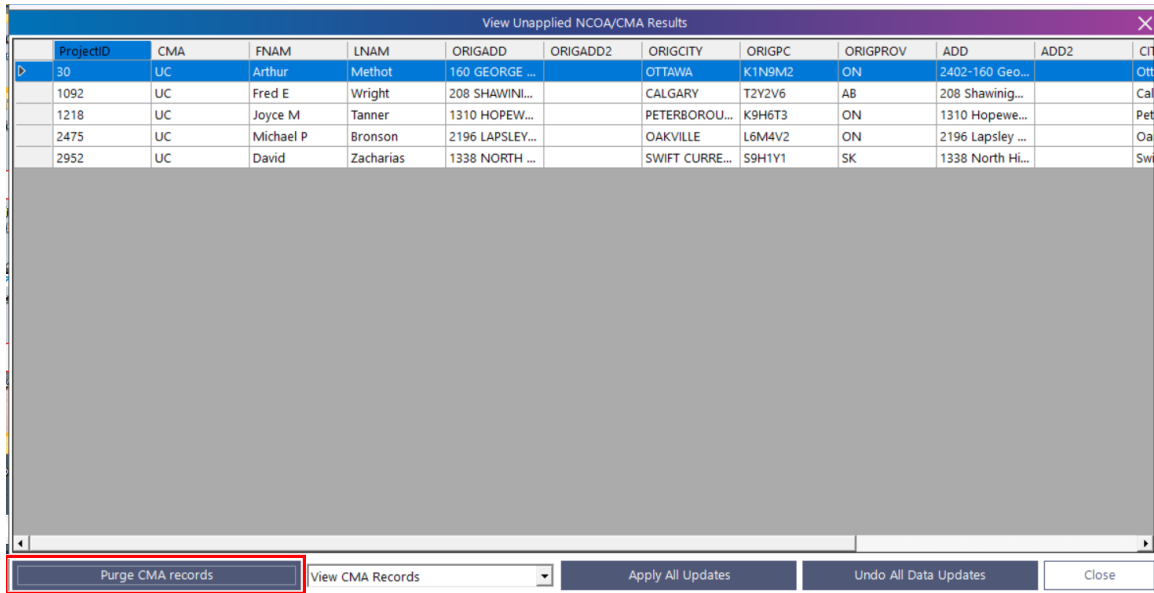
1. After CMA processing is complete, select **File > Reports > Data Management > CMA Suppression**. Select **OK** to open the PDF copy of your report.
2. Once the report displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the report.

Viewing your CMA results

If you have chosen not to purge your results on processing, you will be able to view any matches.

1. After processing, you will be returned to the main dashboard. Options will appear at the bottom of the viewing window. **View CMA Records** will be automatically selected.
2. You can now review your CMA matches by scrolling through the results pages.

- To remove CMA matches from your database, select the **Purge CMA records** button.

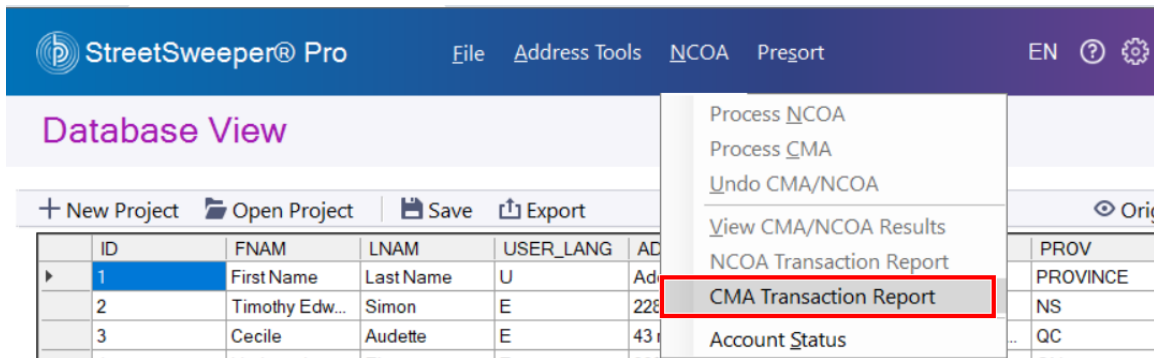


- After this is complete, select the **Close** button. This will return you to the regular database view.
- If you wish to see the CMA results again, select **NCOA > View CMA/NCOA Results**.

Viewing your CMA transaction report

A transaction report is created when CMA processing has been applied to your file.

- NCOA > CMA Transaction Report**. A pdf report will be generated.



- The number of CMA matches identified in your Project will be listed in the row labeled **CMA Records** under **Total**. If the records have been updated in your job, the number of records will be reflected in the **Applied** column. If they have not been updated, the number of records will be

reflected in the **Unapplied** column.

3. This report can be saved and printed.

Reversing your CMA processing

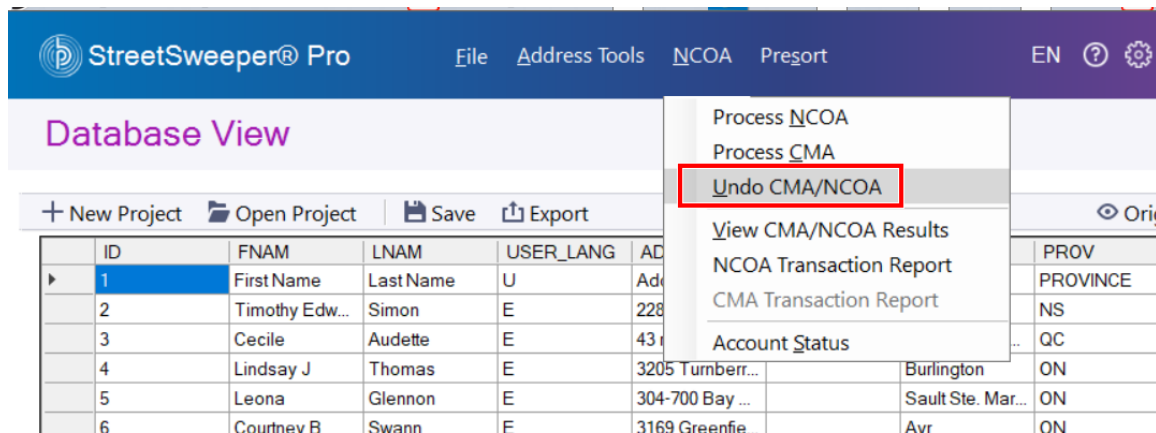
If you did not intend to run CMA processing or you wish to return your Project to its pre-processed state, you can undo the CMA processing.

IMPORTANT: This action will reverse both NCOA and CMA if both processes have been run.

IMPORTANT: Once you have reversed the CMA processing, you will not be able to reprocess your file.

Method 1

1. Select **NCOA > Undo NCOA/CMA**.



2. When the undo request is complete, an acknowledgement box will appear. Select **OK** to continue.

Method 2

1. Select **NCOA > View CMA/NCOA Results**.
2. Select the **Undo All Data Updates** button.
3. Select **Close** to return to the regular database view.

7 - National Change of Address (NCOA)

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Updating records in your database with move information

Processing your Project against Canada Post's National Change of Address (NCOA) service will allow you to update recipients who have moved. If your record matches the NCOA database, the address will be updated, if an updated address is available, or marked as a nixie if the updated address is not available.

IMPORTANT: Prior to processing, you must have EITHER a valid Canada Post End User Terms of Use ID number for your company OR a valid Service Provider Terms of Use ID for your company PLUS a valid End User Terms of Use ID for your customer. To receive a Service Provider or End User Terms of Use ID number, you must have or create an account at www.canadapost.ca/ncoa then agree to the appropriate terms of use.

IMPORTANT: Your file must have been run through correction/validation or validation-only to enable the NCOA processing option.

IMPORTANT: You must have sufficient NCOA credits in your account to process your file. You will require the same number of credits as records in your Project. Please speak with your StreetSweeper Pro sales representative to purchase NCOA credits.

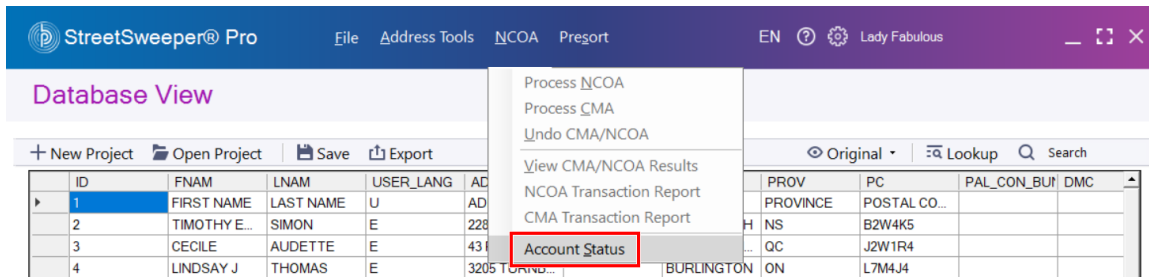
IMPORTANT: StreetSweeper Pro NCOA processing includes the option to run your file against a non-Canada Post database of deceased individuals. This option is included in your NCOA credit.

1. Ensure you have run correction/validation or validation-only on your Project.
2. Select **NCOA > Process NCOA**.
3. Verify that name fields have been appropriately identified. NCOA processing requires an individual's first and last name or a company name.
4. Using the dropdown under **Options**, select the End User associated with this file.
5. Check the **Run Deceased** button if you wish to process your file against this additional database.
6. The default option is to have all matching records updated and all nixies and deceased records purged automatically after processing. If you prefer to see the results prior to purging, uncheck **Purge NCOA** under **Options**.
7. Select **Proceed** to start NCOA processing.

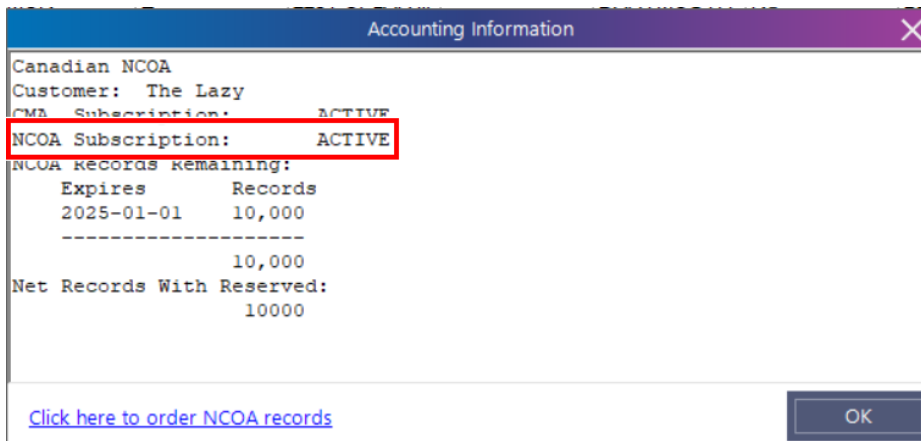
Checking the status of your NCOA account

Using this option, you can see how many credits (transactions) are remaining in your account. Each record process requires one credit.

1. Select **NCOA > Account Status**.



2. Your **NCOA Subscription** should be listed as **ACTIVE**.



3. The number of credits remaining in your account and their expiry date will be listed under **NCOA Records Remaining**.
4. Select **OK** to exit this screen.

Creating and entering your End User Terms of Use ID

If you are not a Service Provider processing files on behalf of a third party, you are considered an End User by Canada Post. To use Canada Post's NCOA service, you must register for an account at www.canadapost.ca/ncoa and agree to the End User Terms of Use. Once this is complete, Canada Post will issue you an End User Terms of Use ID number. It will be in the form EU000000000.

Once you have received your End User Terms of Use ID, it must be entered as part of the Mailer Information screen in StreetSweeper Pro.

1. Select **Settings > Mailer Information**.
2. If you have not already entered your company information, do so now.
3. Select **CPC Account Numbers and IDs**.
4. Enter your **EU Terms of Use ID** in the box under NCOA Terms of Use ID.
5. Select **OK**.
6. Select **Update**. You may now close the screen.

Related topics

- [Creating and entering your customer's End User Terms of Use ID](#)

Creating and entering your Service Provider Terms of Use ID

You are a Service Provider if you process files on behalf of a third party. To use Canada Post's NCOA service, you must register for an account at www.canadapost.ca/ncoa and agree to the Service Provider Terms of Use. Once this is complete, Canada Post will issue you a Service Provider Terms of Use ID number. It will be in the form SP000000000.

You will not be able to use the NCOA service with only a Service Provider Terms of Use ID. You must also have a valid End User Terms of Use ID associated with a customer record in **Settings > Customer List**.

If you are a Service Provider but will also be processing your own lists, you must set your company up as a Customer in **Settings > Customer List** and enter the End User Terms of Use ID number there. Please see [Creating and entering your customer's End User Terms of Use ID](#).

Once you have received your Service Provider Terms of Use ID, it must be entered as part of the Mailer Information screen in StreetSweeper Pro.

1. Select **Settings > Mailer Information**.
2. If you have not already entered your company information, do so now.
3. Select **CPC Account Numbers and IDs**.
4. Enter your **SP Terms of Use ID** in the box under NCOA Terms of Use ID.
5. Select **OK**.
6. Select **Update**. You may now close the screen.

Related topics

- [Creating and entering your customer's End User Terms of Use ID](#)

Creating and entering your customer's End User Terms of Use ID

If you are a Service Provider (processing files on behalf of a third party), your customer must register for an account at www.canadapost.ca/ncoa and agree to the End User Terms of Use. They must then provide this number to you before you can process their files against NCOA. Their End User Terms of Use ID will be in the form EU000000000.

Once you have received your customer's End User Terms of Use ID, it must be entered as part of the Customer List screen in StreetSweeper Pro.

1. Select **Settings > Customer List**.
2. If you have not already created a record for your customer, please do so now. Instructions are available at [Entering your customer's information](#).
3. Click on the customer and select **Edit Customer**.
4. Select **CPC Account Numbers and IDs**.
5. Enter your customer's **EU Terms of Use ID** in the box under NCOA Terms of Use ID.
6. Select **OK**.
7. Select **Update Customer**. You may now close the screen.

Related topics

- [Creating and entering your End User Terms of Use ID](#)

Displaying your NCOA report

After running NCOA processing on your Project, the NCOA transaction report is always available through the central reports screen.

1. After NCOA processing is complete, select **File > Reports > Data Management > NCOA – NationalChange of Address**. Select **OK** to open the PDF copy of your NCOA transaction report.

- Once the report displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
- Select **Print** from your PDF viewer to print the report.

Viewing your NCOA results

If you have chosen not to purge your results on processing, you will be able to view any matches.

- After processing, you will be returned to the main dashboard. Options will appear at the bottom of the viewing window.
- Using the drop down, select which records you wish to view. Your options are:
 - NCOA matches:** the address is no longer valid and an updated address is available
 - Nixies:** the address is no longer valid but no updated address is available
 - Deceased:** the address is no longer valid because the recipient is deceased
- You can now review your matches, nixies, and deceased records by scrolling through the results pages.
- To update your Project with matches and remove nixie and deceased records, select the **Apply All Updates** button.

ProjectID	NCOA	Ncoa_Fname	Ncoa_Mname	Ncoa_Lname	Ncoa_Sfx	Ncoa_add1	Ncoa_add2	Ncoa_City	Ncoa_Prov	Ncoa_PC
66	UI	TIM		HERBERT		69 MACKENZ...		ST CATHARIN...	ON	L2P0E1
77	UB					2681 RUE SAL...		DRUMMOND...	QC	J2C7Y2
87	UI	GREG		KELLER		41 HARTWICK...		SPRUCE GRO...	AB	T7X0C7
91	UF			CALDWELL		309-74 BELLB...		DARTMOUTH	NS	B2W6S2
97	UI	GASTON		LEMAY		347 CH DES ...		ILE DU GRAN...	QC	J0X1J0
99	UI	RAYMOND		LABBEE		124 EDWARD ...		WINNIPEG	MB	R2C2H4
139	UI	PIERRE		DESJARDINS		101-238 14E AV		SAINT-LIN-LA...	QC	J5M2X5
157	UI	Jacinthe		DESCHENES		1145 RUE DE...		TROIS-RIVIERES	QC	G8V2P2
165	UB					19 ALBERT		DUNGANNON	ON	N0M1R0
187	UI	JOHN		MOUNSTEPH...		37 MAPLE RID...		ORO-MEDON...	ON	L0L2L0
217	UI	TYLER		EDMUNDS		RR 1		DIDSBURY	AB	T0M0W0
251	UI	Ron		COLES		408-80 BURN...		KING CITY	ON	L7B0B3
267	UI	Clair		COUTURE		415-915 SASK...		SASKATOON	SK	S7M0M7
282	UI	ROSANNE		PAULIN		PO BOX 1775		CARSTAIRS	AB	T0M0N0
325	UI	DARCY		DEGRAVES		6016 1A AVE ...		EDMONTON	AB	T6X0E7
333	UI	CHERYL		PLOMP		560 DEVONIA...		LETHBRIDGE	AB	T1J5J6
337	UI	ROBERT		KRAUSE		205-2850 ALD...		VICTORIA	BC	V9B3S7
346	UI	MARVIN		BROSE		42-100 BROO...		WARMAN	SK	S0K0A1
368	UI	BARBARA		BEREZUK		4032 BISHOPS...		MISSISSAUGA	ON	L4Z1J2
370	UI	LEONARD		RAYMOND		12 GLEN RD		BELLEVILLE	ON	K8P4G1
386	UI	ROY		WAGLER		48 WAVERLEY...		BOWMANVILLE	ON	L1C1L1
426	UI	LEON		REID		201-75 BRIST...		MISSISSAUGA	ON	L4Z3P2

Apply NCOA Match Updates | View NCOA Changes | **Apply All Updates** | Undo All Data Updates | Close

- After this is complete, select the **Close** button. This will return you to the regular database view.
- If you wish to see the NCOA results again, select **NCOA > View CMA/NCOA Results**.

Reversing your NCOA processing

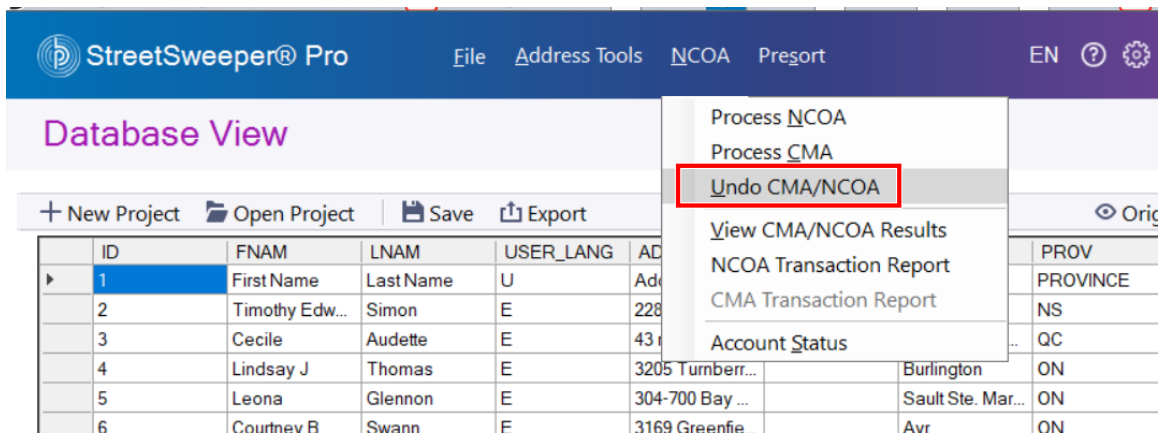
If you did not intend to run NCOA processing or you wish to return your Project to its pre-processed state, you can undo the NCOA processing.

IMPORTANT: This action will reverse both NCOA and CMA if both processes have been run.

IMPORTANT: Once you have reversed the NCOA process, you will not be able to reprocess your file.

Method 1

1. Select **NCOA > Undo NCOA/CMA**.



2. When the undo request is complete, an acknowledgement box will appear. Select **OK** to continue.

Method 2

1. Select **NCOA > View CMA/NCOA Results**.
2. Select the **Undo All Data Updates** button.
3. Select **Close** to return to the regular database view.

8 - GeoSmart

In this section

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Adding location data to your records

Using Geosmart, you can add latitude, longitude, and a time zone to each record in your database. Latitude and longitude are at the postal code level and represent the centroid (most central point) of the postal code.

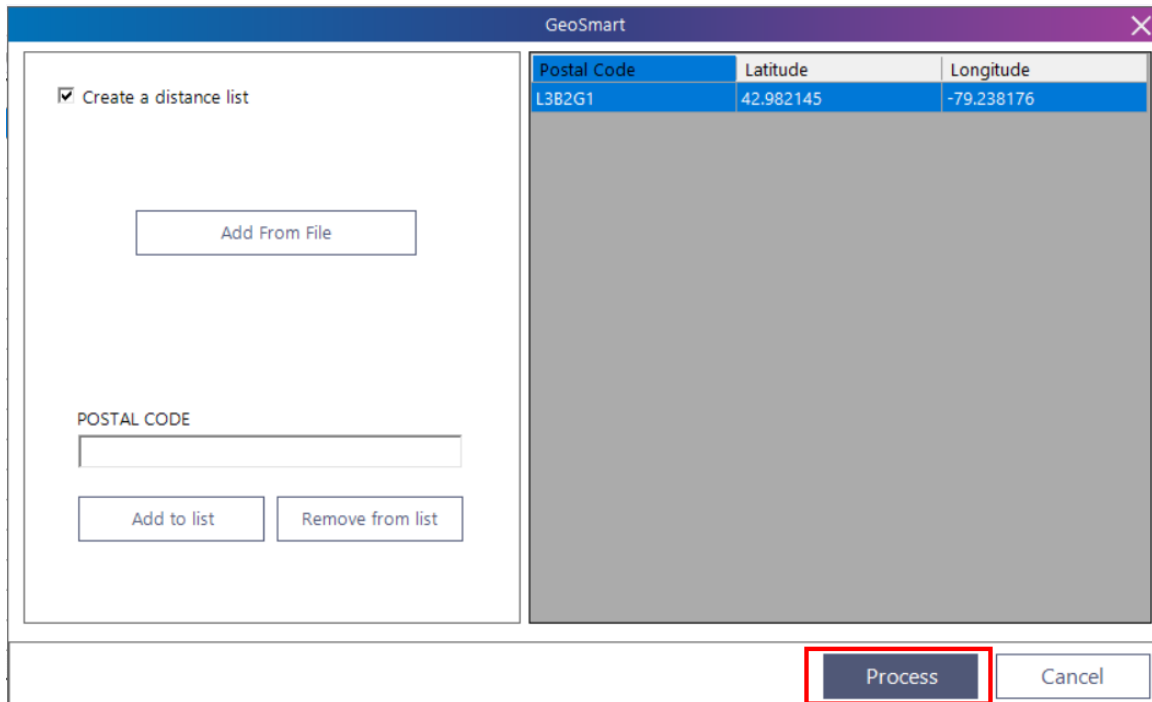
1. For the most accurate results, it is recommended that you run **Correction/Validation** or **Validation** on your database prior to adding location data.
2. Select **Address Tools > Geosmart**.
3. Select **Process**.
4. StreetSweeper Pro will return to the Database View during and after processing. To view results, scroll to the right of the database until you see the fields **GEO_LATITUDE**, **GEO_LONGITUDE** and **GEO_TIMEZONE**.
5. Location data can be exported by selecting **File > Export File** and choosing the fields you wish to keep in your database.

Calculating distances to a target postal code

Geosmart will allow you to calculate the distance between each record in your database and a target postal code. You can use this information to select records that fall within a prescribed distance from that target postal code.

1. For the most accurate results, it is recommended that you run **Correction/Validation** or **Validation** on your database prior to adding location data.
2. Select **Address Tools > Geosmart**.
3. Select **Create a distance list**.

4. Select **Process**.



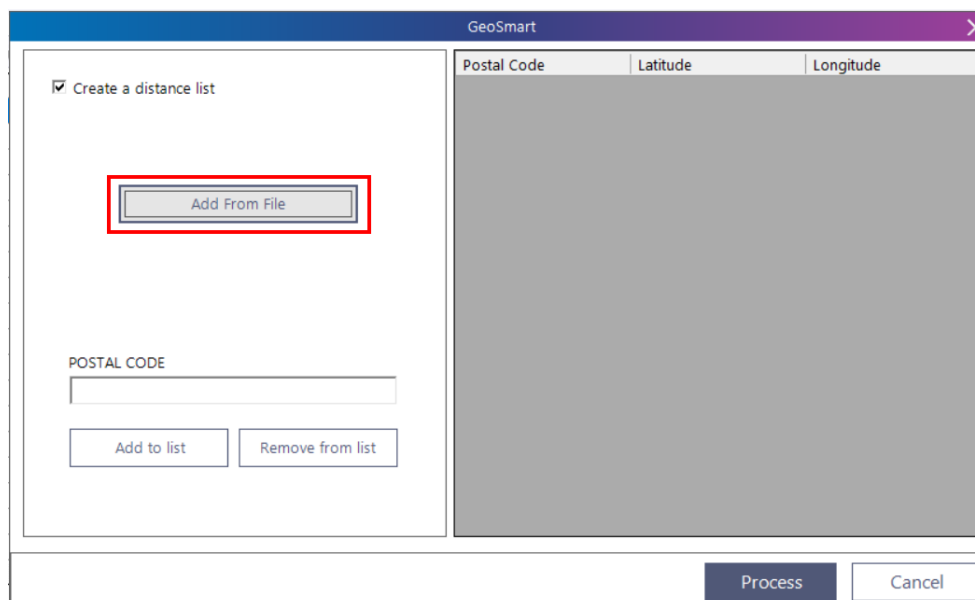
5. StreetSweeper Pro will return to the Database View during and after processing. To view results, scroll to the right of the database until you see the fields **GEO_NEARESTPC** and **GEO_DISTANCE**. The **GEO_DISTANCE** field is the calculated distance, in kilometers, between the record and the target postal code.
6. You can specify the maximum and minimum distances of your export file by selecting **File > Export File** and entering in these distances where indicated.

Calculating the closest target postal code using a file

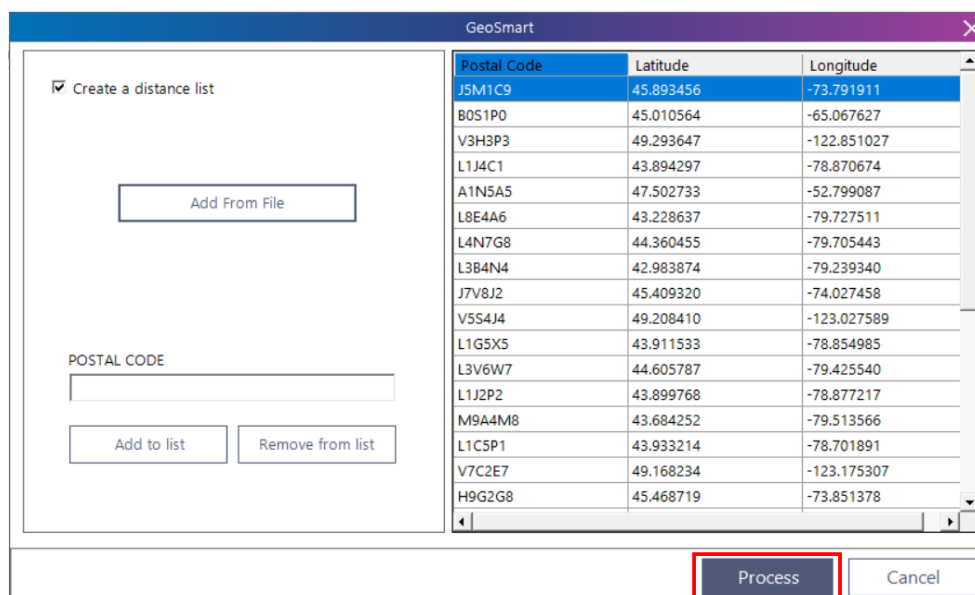
If you have a list of target postal codes, Geosmart will calculate the closest of those postal codes for each record in your database. You can use this information to determine the closest target postal code for each record. As well, you can use this information to select records that fall within a prescribed distance from the closest target postal code.

1. For the most accurate results, it is recommended that you run **Correction/Validation** or **Validation** on your database prior to adding location data.
2. Select **Address Tools > Geosmart**.
3. Select **Create a distance list**.

- Select the **Add from File** button. Browse to find your postal code file and select **Open**. The postal codes will appear in the viewing box on the right.



- Select **Process**.



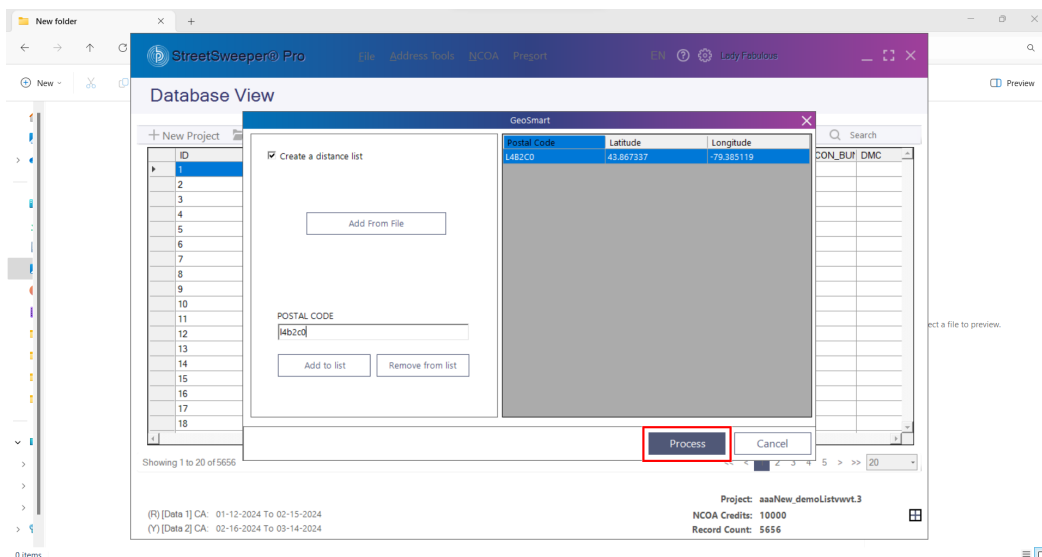
- StreetSweeper Pro will return to the Database View during and after processing. To view results, scroll to the right of the database until you see the fields **GEO_NEARESTPC** and **GEO_DISTANCE**. The **GEO_NEARESTPC** field will display the closest of the target postal codes to the record. **GEO_DISTANCE** field is the calculated distance, in kilometers, between the record and that target postal code.

7. You can specify the maximum and minimum distances of your export file by selecting **File > Export File** and entering in these distances where indicated.

Calculating the closest target postal code using manual entry

If you have multiple target postal codes, Geosmart will calculate the closest of those postal codes for each record in your database. You can use this information to determine the closest target postal code for each record and to select records that fall within a prescribed distance from the closest target postal code.

1. For the most accurate results, it is recommended that you run **Correction/Validation** or **Validation** on your database prior to adding location data.
2. Select **Address Tools > Geosmart**.
3. Select **Create a distance list**.
4. Enter the first postal code in the box below Postal Code. Select **Add to list**. The postal code will appear in the viewing box on the right.
5. Continue adding additional postal codes. If you make an error, select the postal code from the viewing box and select **Remove from list**.
6. When all postal codes have been added, select **Process**.



7. StreetSweeper Pro will return to the Database View during and after processing. To view results, scroll to the right of the database until you see the fields **GEO_NEARESTPC** and **GEO_DISTANCE**. The GEO_NEARESTPC field will display the closest of the target postal codes to the record. GEO_DISTANCE field is the calculated distance, in kilometers, between the record and that target postal code.
8. You can specify the maximum and minimum distances of your export file by selecting **File > Export File** and entering in these distances where indicated.

Displaying your Geosmart report

After adding geographic coordinates and/or distances to records in your Project, the report is always available through the central reports screen.

1. After Geosmart processing is complete, select **File > Reports > Data Management > GeoSmart**. Select **OK** to open the PDF copy of your report.
2. Once the report displays on screen, select **Save or Save As** from your PDF viewer. Select the appropriate folder to save the file.
3. Select **Print** from your PDF viewer to print the report.



3001 Summer Street
Stamford, Connecticut 06926
www.pitneybowes.com

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