

TheRaiser'sEdge[®] Enterprise[™]

Address Validation Guide for Australia

032505

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Address Validation Guide for Australia

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What Is In This Guide?

In the *Address Validation Guide for Australia*, you learn to update and certify addresses in your database to qualify for discounts on your mailings and ensure they reach the intended recipients. You can also learn about the following.

- “Understanding Address Validation Footnote Flags” on page 5
- “Accessing Address Validation Data Files” on page 6
- “Setting a Country’s Availability for Address Validation” on page 11
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How Do I Use These Guides?

The Raiser’s Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser’s Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support, Documentation, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser’s Edge* by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

W e l c o m e



Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.



The notepad symbol designates a note or tip related to the information in the main text column.



The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.



The clock symbol designates a shortcut or timesaving action.



The dictionary symbol designates the definition of a frequently used term.

Address Validation

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Chapter 1

Mailings are important to your work as a nonprofit organisation or charity. The address correction service *Address Validation* checks, corrects, and certifies the addresses in your database to ensure your mailings reach the intended recipients.

With the *Address Validation* data correction service, you can easily search for and apply address corrections and validate addresses right in your database. You will receive CDs from Blackbaud quarterly that contain every deliverable mailing address in Australia. You must install the data files onto your computer. You can use the installed data files as often as necessary to validate your mailing list. You can update addresses with missing or misspelt information, correct missing or incorrect postcodes, and standardise street addresses to qualify for postal discounts.

With *Address Validation*, you can choose to correct and validate addresses for **All Records**, **Selected Records**, or **One Record**. You can also print an **Updated Address Report** and the required Address Matching Summary (AMAS) report that must accompany mailings qualifying for discounts. You can also use *Address Validation* with other parts of *The Raiser's Edge Enterprise* to look up, correct, and validate addresses when entering constituents in *Batch*, from the address screen of a constituent record, and from the PreSort tab in *Mail*, if you also use *PreSort*.

For more information about Australia Post addressing requirements, we recommend you see the Australia Post publication, *Address Presentation Standards*. To order this or any other Australia Post publication or to find Customer Service Centres in your State, call 13 13 18 or visit the Web site at www.auspost.com.au. For more information, contact the Australia Post Customer Service Centre at +61 3 9299 4405, or send an email message to dlvicccmgmt@auspost.com.au.

 For more information about *PreSort* and PreSort discounts, see the *PreSort Guide for Australia*.

Frequently Used Terms

To effectively use mail tasks for your organisation's fundraising efforts, you should have a basic understanding of common mail terms. If you find an unfamiliar term when reading this or any guide in *The Raiser's Edge* documentation, search the online glossary in the help file.

Address certification. Address certification is a process used by Australia Post to ensure a specific level of quality in a mailing list. The objective of address certification is to increase the accuracy of the street names, street numbers, suburb names, State abbreviations, and postcodes in addresses on your mailing list. The *Address Validation* subscription service corrects and certifies addresses in your database.

Address format. Correct Australia Post-required address formatting is as follows:

Mrs Angela Lessing
27 Stokes Street
TOWNSVILLE QLD 4810

Address Presentation Standards. The *Address Presentation Standards* publication, put out by Australia Post, details addressing requirements for postal discounts. We recommend you refer to this guide. To obtain a copy, visit the Australia Post Web site at www.auspost.com.au or contact the Australia Post Customer Service Centre at +61 3 9299 4405.

Address Matching Summary Report. The Address Matching Summary Report prints from *Address Validation* and must be submitted with a mailing as proof it qualifies for postal discount rates.

AMAS. AMAS stands for Address Matching Approval System. Software approved by this system of Australia Post adds barcodes to mailing pieces. Blackbaud's *Address Validation* is AMAS-approved for address certification and qualifying your mailings for postal discounts. The AMAS system is designed to improve address quality on mailings in the Australia Post system. Addressing your mailings appropriately cuts costs to your organisation and assures they reach their intended recipients quicker.

Barcode. Barcodes are required to be printed on mailing pieces in order to be eligible for postal discounts, as of July 2002. The Postcode and the Delivery Point Identifier (DPID) combined create the Address barcode. For more information, see the entry for DPID.

DPID. DPID stands for Delivery Point Identifier. A DPID is an eight-digit barcode assigned to each delivery point, or address. Blackbaud's *Address Validation* module applies a DPID to each address, assuring your mailings reach their intended recipients quickly. Applying a DPID to your mailings also qualifies you for further PreSort discounts. For more information about Australia Post PreSort discounts or Blackbaud's *PreSort* module, see the *PreSort Guide for Australia* or contact Blackbaud Sales at solutions@blackbaud.com.au.

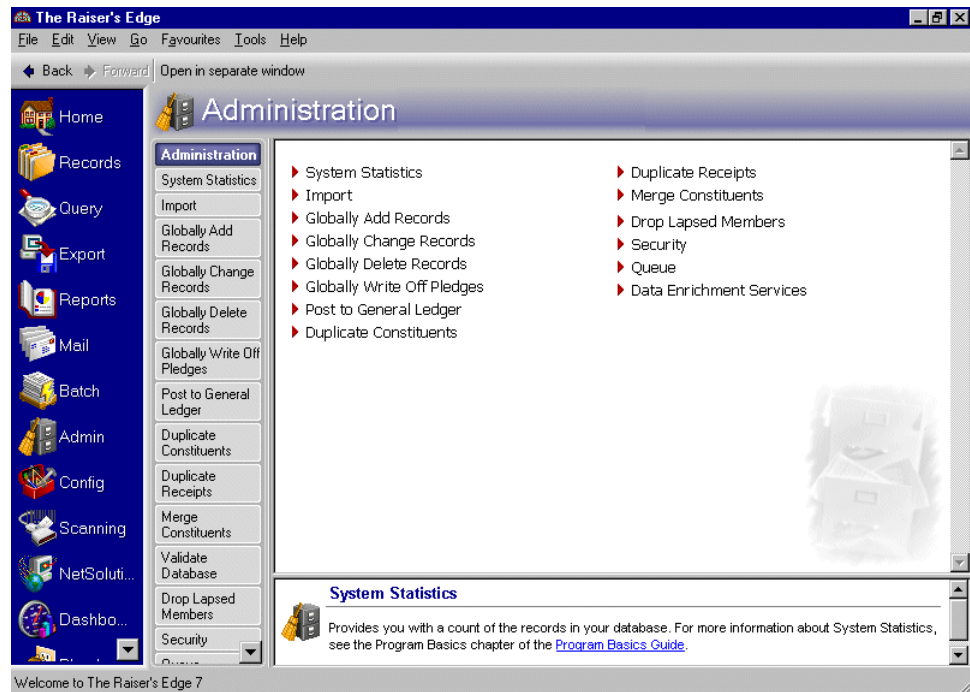
Lodge. Lodge means to post a mailing from a postal facility, usually in bulk, sorted in trays, and meeting the particular service requirements.

PAF. The Postal Address File, or PAF, is a national reference file containing all addresses in the Australia Post delivery area and their associated unique Delivery Point Identifier (DPID). Australia Post releases an updated PAF each quarter. With *Address Validation*, you receive the PAF file in the form of Address Validation data files on CD from Blackbaud quarterly. To keep your addresses current and correct, install the files from the most recent CD onto your computer.

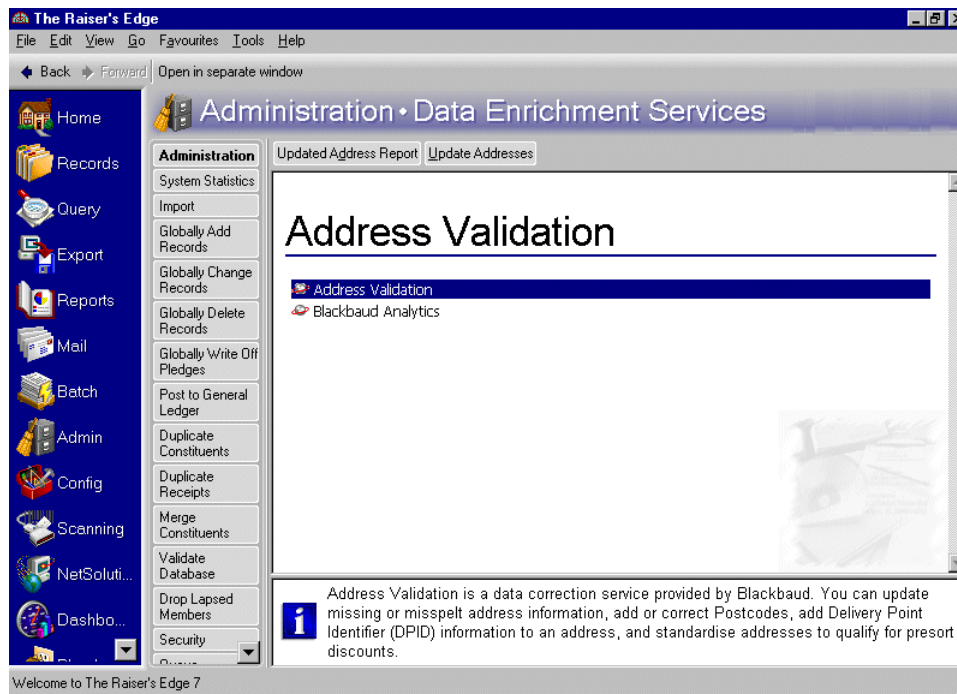
Postcode. The postcode is a coding system that identifies the post office or metropolitan area associated with an address. The postcode is a vital part of all addresses in Australia. A postcode is a four-character number included as part of each address which indicates a particular delivery location.

Navigating in Address Validation

To access *Address Validation*, click **Admin** on the Raiser's Edge bar and click the **Data Enrichment Services** link.



The Data Enrichment Services page appears with the **Address Validation** service highlighted.



Understanding Address Validation Footnote Flags

When addresses are processed and updated by *Address Validation*, addresses that create exceptions are flagged with footnotes to indicate the reason why the address could not be certified. An exception prevents the program from updating the address in your database. For example, an address with the footnote flag “E” has a street number and street name that do not match Australia Post’s list of existing addresses. Because a matching street name and number are not found, an exception is created to alert you that a problem exists. You can store these footnote flags as address attributes on the Attributes tab of the Address screen on the constituent record. The following footnote flags are used with *Address Validation*.

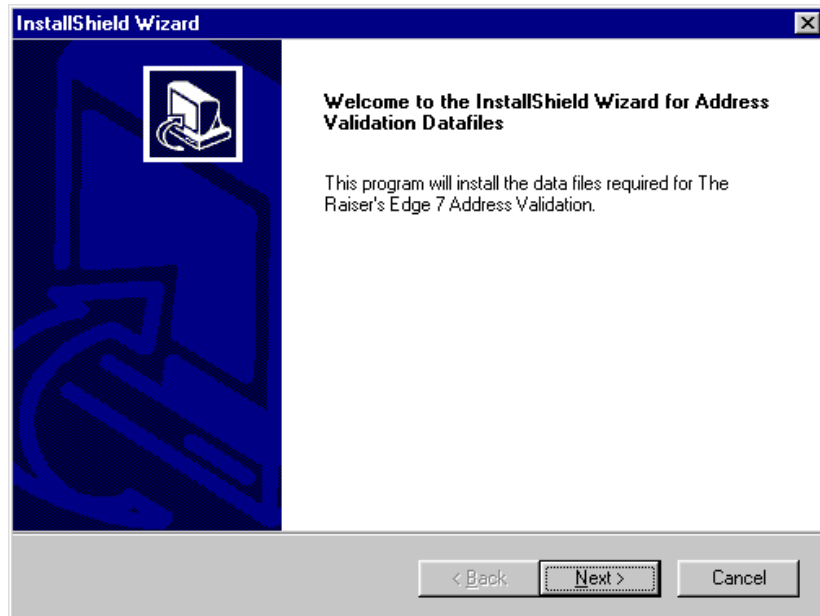
Footnote Flag.	Meaning.
A	Unknown error with address.
B	Unable to match Locality and Postcode.
C	Unable to match or correct Locality.
D	Unable to parse Street or PDT from address.
E	Unable to match House Number in Street.
F	Unable to match Postal Delivery Number.
G	Unable to parse Unit Number from address.

Accessing Address Validation Data Files

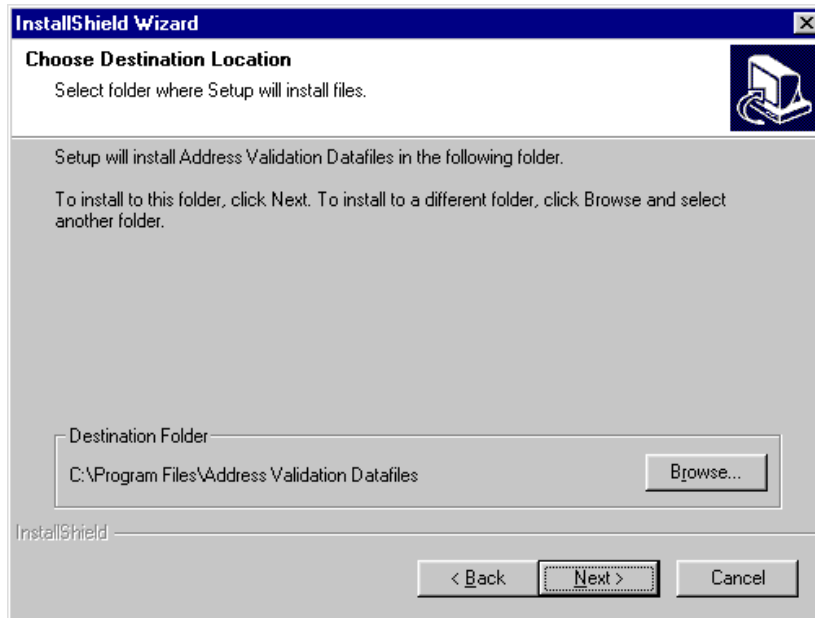
Australia Post updates *Address Validation* data files quarterly. You will receive CDs in the mail every few months that contain the most recent information for all addresses in Australia. To access the information in the *Address Validation* data files, you must install the data files from the CD on your computer. If you work on a network, you can install the data files on the server or in a shared folder on any computer all users can access. Then, you must link the files to *The Raiser's Edge* by entering the path to the data files in User Options.

➤ Accessing Address Validation information

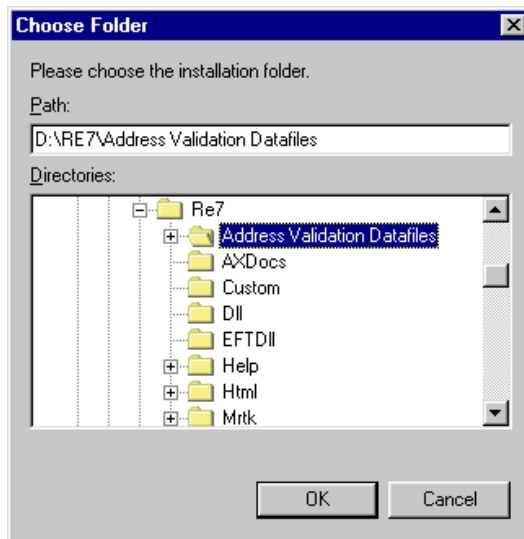
1. Place the latest *Address Validation* CD into the CD drive on your computer. The InstallShield Wizard appears to guide you through installation.




2. Click **Next**. The Choose Destination Location screen appears.



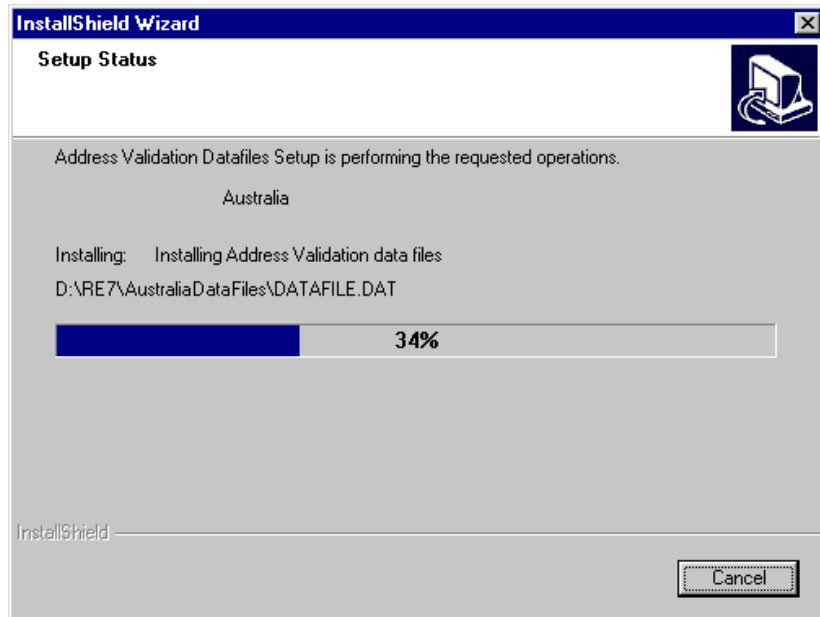
3. In the **Destination Folder** frame, the default location to install the *Address Validation* data files appears. If you do not want to install the data files in the default location, click **Browse** to select a different location. The Choose Folder screen appears.



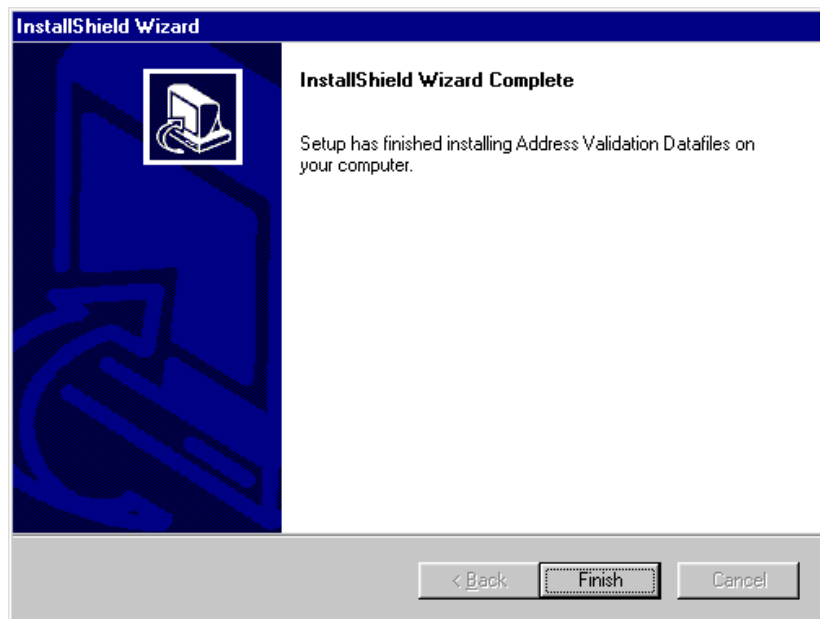
4. In the **Path** field, enter the location for the data files or select a location in the **Directories** frame by opening the folder in which you want to install the data files. You can install the data files where you have *The Raiser's Edge* installed and create a new folder. For example, you can name this folder "Address Validation Datafiles". If you work on a network, you can install the data files on the server or in a shared folder on any computer all users can access.

 You can click **Cancel** at any time to stop the installation. If you do so, the data files will not be installed or usable, no matter what percentage is displayed on the status bar. You must start the installation process again to successfully install the data files.

5. Click **OK**. You return to the Choose Destination Location screen. The location you selected for the data files appears in the **Destination Folder** frame.
6. Click **Next**. The Setup Status screen appears. The status bar indicates the percentage of the installation process completed.

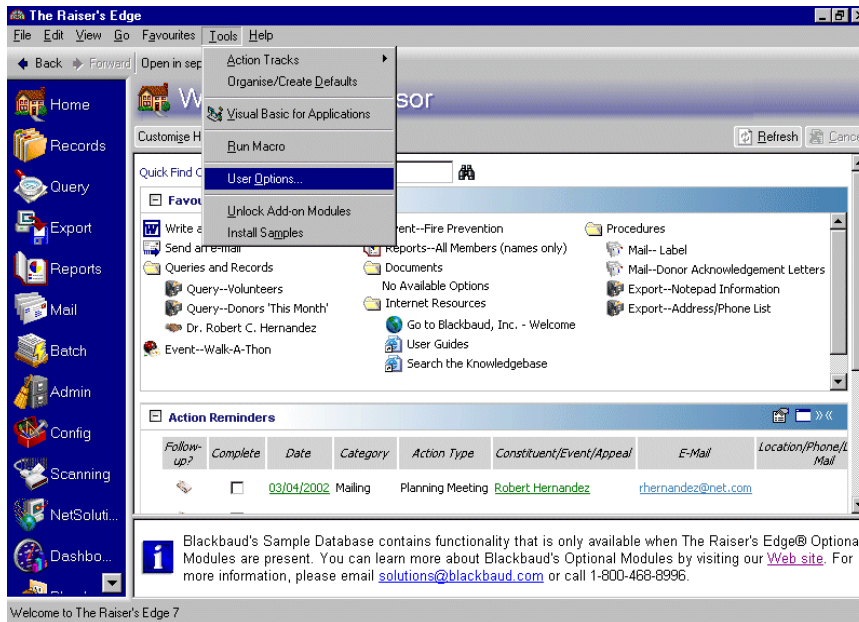


When the status bar reaches 100%, the *Address Validation* data files are successfully installed. The InstallShield Wizard Complete screen appears.

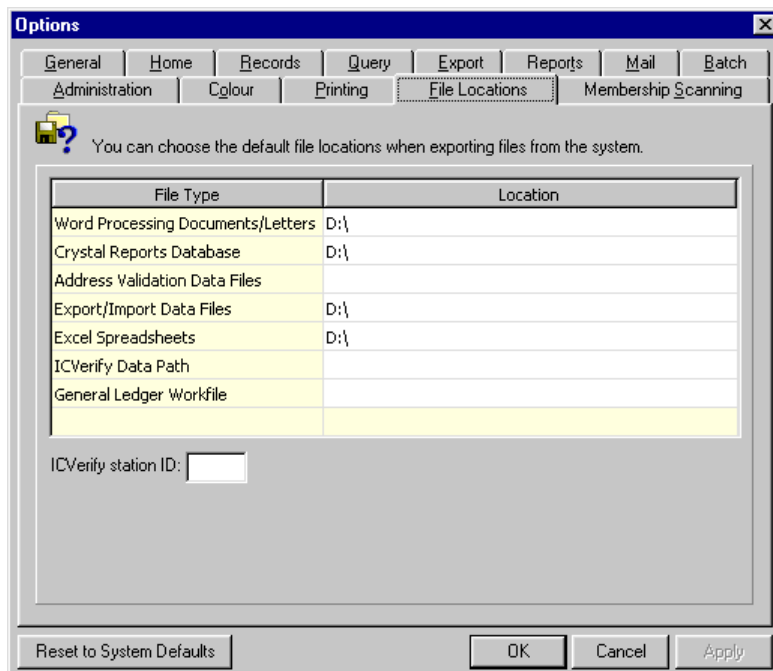


7. Click **Finish**.
8. Open *The Raiser's Edge*.

- From the shell menu bar, select **Tools, User Options**.

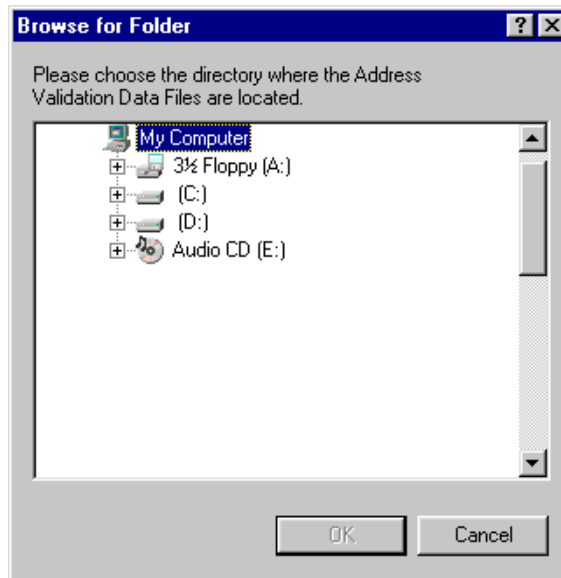


The Options screen appears.

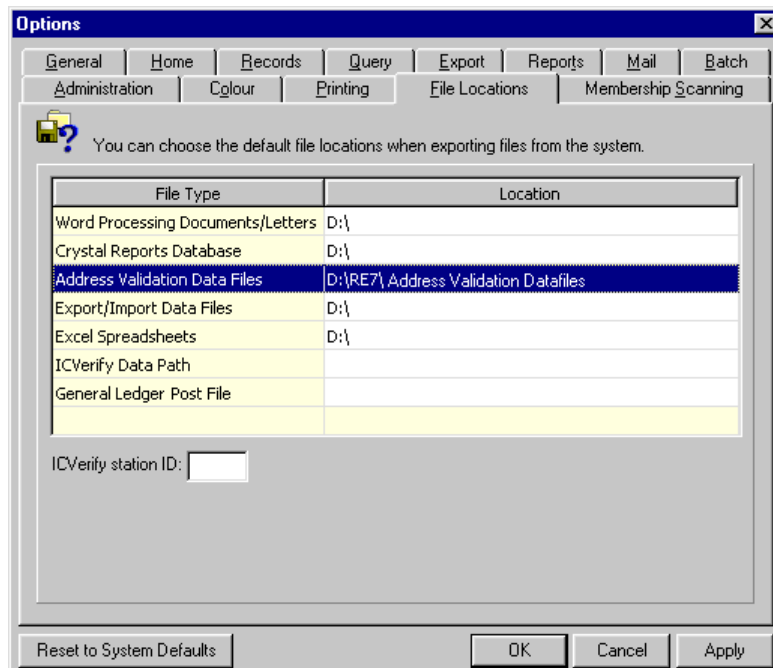


- Select the File Locations tab.
- On the **Address Validation Data Files** row, place your cursor in the **Location** column. An ellipsis appears.

12. Enter the path to the *Address Validation* data files you just installed or click the ellipsis to browse to the location. If you click the ellipsis, the Browse for Folder screen appears, so you can locate the data files.



13. Once you locate the data files, highlight the folder and click **OK**. You return to the User Options screen. The path to the files appears in the **Address Validation Data Files** row.



14. To set the path, click **Apply**.
15. To save the path you entered, click **OK**. You return to the shell page in *The Raiser's Edge*.

You are now ready to begin correcting, updating, and certifying addresses.


Setting a Country's Availability for Address Validation


Access a country record through the International page of *Configuration*.

The **Addresses with this country are available for address validation** checkbox is visible only if you have *Address Validation*. Ticking this checkbox means that addresses for this country are available for validation through the service.

The checkbox defaults to ticked for your country and unticked for all other countries. If you tick the checkbox for another country, you need to obtain the *Address Validation* version for that country (if one is available) in order to validate addresses in it.

If you set the business rule to automatically attempt to validate any address you edit, *Address Validation* will attempt to validate only addresses in countries with this checkbox ticked. For more information, see “Establishing a Business Rule to Automatically Update Addresses” on page 69.

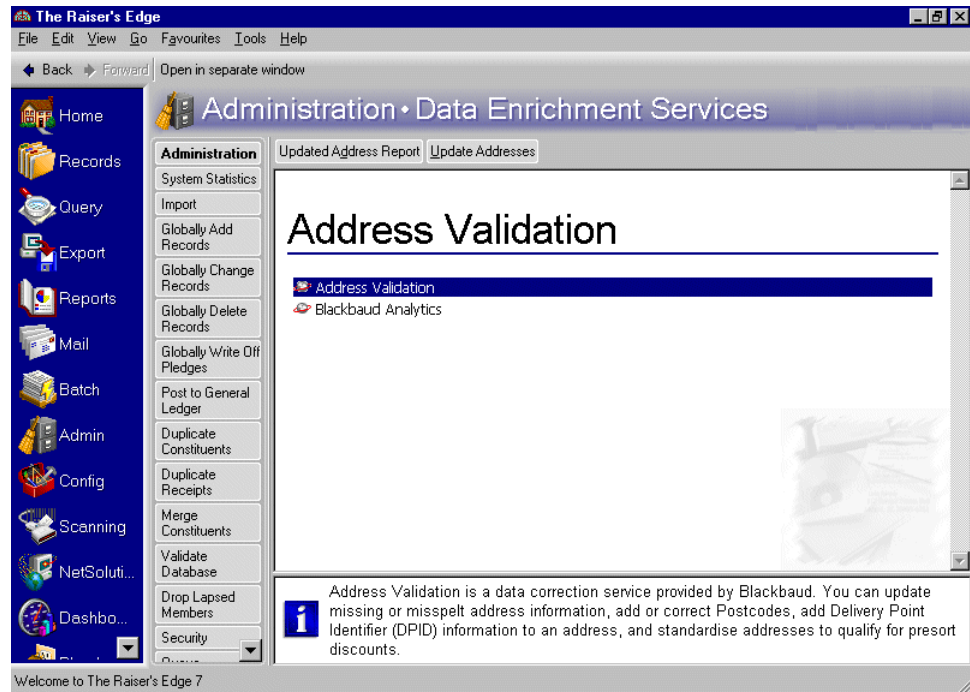
 You may need to close out of *The Raiser's Edge* and reopen it or restart your computer to get maximum performance from newly-installed data files.

 If you have not entered a data file location in User Options, a message appears when you click one of the links on the Data Enrichment Services page. You can enter a path to the data files on the message.

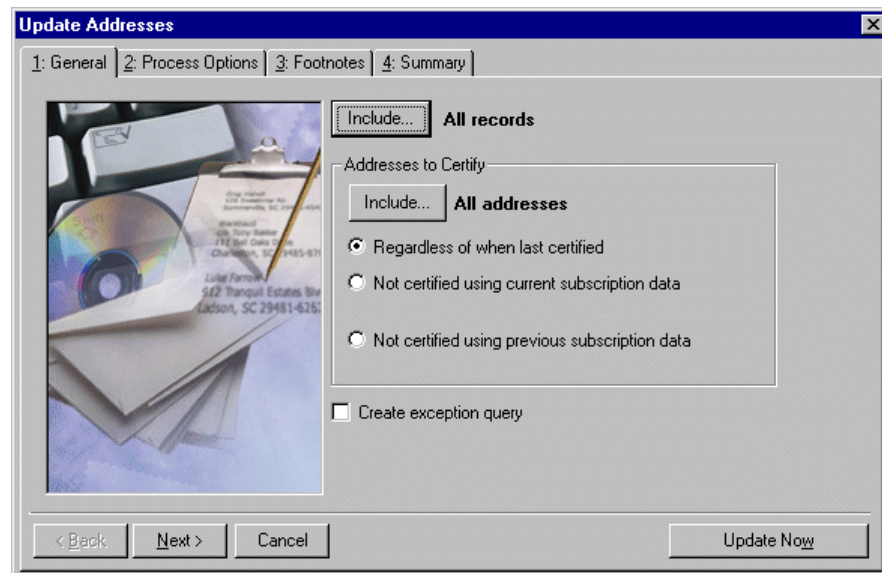
Selecting an Address Type

When you use *Address Validation*, you need to select whether to update all address types or a specific address type for the constituents you select. For example, you can choose to validate every address entered on the Addresses tab of a constituent record or you can update a specific address type, such as the Preferred address.

From the Data Enrichment Services page, click the **Update Addresses** link.



The Update Addresses screen appears.



Click the first **Include** button at the top of the screen to include either **All records**, **Selected records**, or **One record** for which to update addresses.

In the **Addresses to Certify** frame, click **Include** to select which address types listed on a constituent record to update. You can update all or specified address types by selecting **All Addresses** or **Selected Addresses** from the submenu that appears. For example, you can update just the Preferred address, Primary business address, and First address in list. If you choose **Selected Addresses**, the Customisation Options for Addresses to Include screen appears, so you can select the address type you want to update for each constituent. This screen has an Individuals tab and an Organisations tab.

Individuals Tab


Once you click **Include** in the **Addresses to Certify** frame on the Update Addresses screen and choose **Selected Addresses**, the Customisation Options for Addresses to Include screen appears. On the Individuals tab of this screen, you need to select the address type to update for each individual constituent. The program selects an address for each individual using four steps and considers seasonal addresses, address attributes, and specific address types. When the program cannot find a valid address for an individual, you can select an alternate address to update. It is important to indicate your preferences in each of the four steps on the Individuals tab, so the program can select the best address to update for each individual.


The screenshot shows a dialog box titled "Customisation Options for Addresses to Include" with a close button (X) in the top right corner. At the top, there are two tabs: "1: Individuals" (selected) and "2: Organisations". Below the tabs is a text box with the instruction: "Select which addresses will undergo certification for individuals that are included in this process." The dialog is divided into four steps:

- Step 1:** "Indicate if seasonal addresses should be considered. The first valid seasonal address will be used." It includes a checked checkbox "Consider addresses with seasonal dates as of" followed by a dropdown menu set to "Today".
- Step 2:** "Specify, in the order of importance, the addresses to consider if a valid seasonal address is not found." It features two list boxes. The left box, labeled "Addresses:", contains "First address found", "Primary business", "Spouse primary business", and "Spouse preferred address". The right box, labeled "Addresses to use:", contains "Preferred address". Arrows between the boxes allow for moving items between them.
- Step 3:** "You may check for special requirements by first considering addresses with the specified attribute(s)." It includes a button "Address Attributes..." and a dropdown menu currently showing "<No address attributes specified>".
- Step 4:** "Specify what happens if no address is found:" followed by a dropdown menu set to "Include Preferred address".

At the bottom of the dialog are "OK" and "Cancel" buttons.

The addresses of each individual constituent in the mailing list are processed using the four steps on the Individuals tab. For example, you have three individual constituents in your mailing list: Larry Smith, Melvin Thomas, and Cindy Harris. When the program selects an address for each of these constituents, it begins with the first constituent in the list. To find an address for Larry Smith, the program compares Larry's addresses with the information you entered in steps 1 through 4. After the program finds a valid address for Larry, it uses steps 1 through 4 to find a valid address for Melvin Thomas.

 Addresses other than Australia-formatted are included in processing, but fail the first test and are not considered for further processing against the exception rules. Only addresses formatted like Australian addresses are included in the final processing. Foreign addresses appear in an exception query.

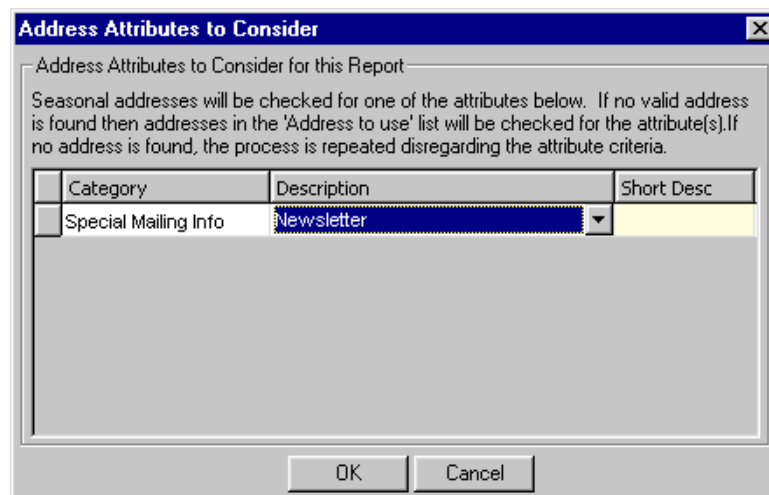
 The Individuals tab is used to find addresses for individual constituents in your database. To select organisation addresses to update, use the Organisations tab.

Because the address used for each constituent is selected individually to find the best address on the constituent record, different address types may be selected for constituents in the mailing list. For example, according to the information you entered on the Individuals tab, the Preferred Address may be selected for Larry Smith; the Business Address may be selected for Melvin Thomas; and the Summer Home address may be selected for Cindy Harris.

Step 1. In Step 1, indicate whether seasonal addresses should be selected for the address update by ticking the **Consider addresses with seasonal dates as of** checkbox. When you tick this checkbox, you need to select a date, such as Today, Yesterday, or <Specific date> in the corresponding field. When you select <Specific date>, the **Date** field appears, so you can enter a date, such as 01/01/2007. The date information you enter is used to determine whether a seasonal address is valid. If seasonal addresses are considered, the program selects the first valid seasonal address it finds. If a valid seasonal address is not found, the program uses your selections in Step 2.

Step 2. In Step 2, specify the address types to consider if a valid seasonal address is not found in Step 1, or if you chose not to include seasonal addresses in the update. To select the address type to update, highlight an address type in the **Addresses** box and click the single right arrow to move it to the **Addresses to use** box. If you list multiple address types in the **Addresses to use** box, you need to sort the address types in the order of their importance. To move an address type within the **Addresses to use** box, highlight the address type and click the up or down arrow, as necessary. For example, you can include the Preferred address and the Primary business address types by highlighting them in the **Addresses** box and clicking the single right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to update the Preferred address. Because the program selects the address to update based on its position in the **Addresses to use** box, you need to use the arrows to move the Preferred address to the top of the list.

Step 3. In Step 3, you can use attributes to choose the address type to update by clicking the **Address Attributes** button. When you click **Address Attributes**, the Address Attributes to Consider screen appears.



On this screen, you can select an attribute category and description that must be present on an address record in order for the address to be considered for the update. For example, to update addresses with the attribute **Category** of Mailing Address and a **Description** of Lost Address, select the information on this screen. For information about entering attributes, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.


Step 4. In **Step 4**, you need to select what the program should do if it cannot find an address for the organisation or contact meeting your selections in Steps 1 through 3. You can select to include the preferred address, the first address listed on the Address tab of a constituent record, the primary business address, the primary spouse business address, or all user-defined address types.


Organisations Tab

Once you click **Include** in the **Addresses to Certify** frame on the Update Addresses screen and choose **Selected Addresses**, the Customisation Options for Addresses to Include screen appears. On the Organisations tab of this screen, you need to select the address type to update for each organisation constituent. The program selects an address for each organisation using four steps and considers seasonal addresses, address attributes, and specific address types. When the program is unable to find a valid address for an organisation, you can select an alternate address to update. It is important to indicate your preferences in each of the four steps on the Organisations tab, so the program can choose the best address to update for each organisation.

The addresses of each organisation constituent in the mailing list are processed using the four steps on the Organisations tab. For example, you have three organisation constituents in your mailing list: Baldwin Entertainment, City Insurance Company, and Outside Investments. When the program selects an address for each of these constituents, it begins with the first constituent in the list. To find an address for Baldwin Entertainment, the program compares Baldwin Entertainment's addresses with the information you entered in steps 1 through 4. After the program finds a valid address for Baldwin Entertainment, it uses steps 1 through 4 to find a valid address for City Insurance Company.

Because the address used for each constituent is selected individually, to find the best address on the constituent record, different address types may be selected for constituents in the mailing list. For example, according to the information you entered on the Individuals tab, the Preferred Address may be selected for Baldwin Entertainment, the Business Address may be selected for City Insurance Company, and the Mailing Address may be selected for Outside Investments.

 Ellipses appear at the end of the display if the attributes you selected do not fit in the area provided.

 The Organisations tab is used to find addresses for organisation constituents in your database. To select individual addresses to update, use the Individuals tab.

Step 1. In Step 1, indicate whether to update the address of an organisation's contact or the address of the organisation. Your selection in Step 1 affects the rest of the steps on this tab. If you select **Print only the organisation**, the Organisations tab appears as shown below.

The screenshot shows the 'Customisation Options for Addresses to Include' dialog box. The '2: Organisations' tab is selected. The 'Step 1' section has the radio button for 'Print only the organisation' selected. The 'Step 2' section shows a list of addresses in the 'Addresses' box: 'First address found', 'RE 7.50 Address Conversion', 'Shipping', and 'L...'. The 'Addresses to use' box contains 'Preferred address'. The 'Step 3' section has a button for 'Address Attributes...' and a dropdown menu showing '<No address attributes specified>'. The 'Step 4' section has a dropdown menu showing 'Include Organisation's preferred address'. The 'OK' and 'Cancel' buttons are at the bottom.

If you select **Print contacts**, the Organisations tab appears as shown below.

The screenshot shows the 'Customisation Options for Addresses to Include' dialog box. The '2: Organisations' tab is selected. The 'Step 1' section has the radio button for 'Print contacts' selected. The 'Step 2' section has a button for 'Contact Information' and a dropdown menu showing '<All contact types>'. There is also a button for 'Contact Address Attributes...' and a dropdown menu showing '<No contact address attributes specified>'. The 'Step 3' section has a dropdown menu showing 'Preferred address'. The 'OK' and 'Cancel' buttons are at the bottom.

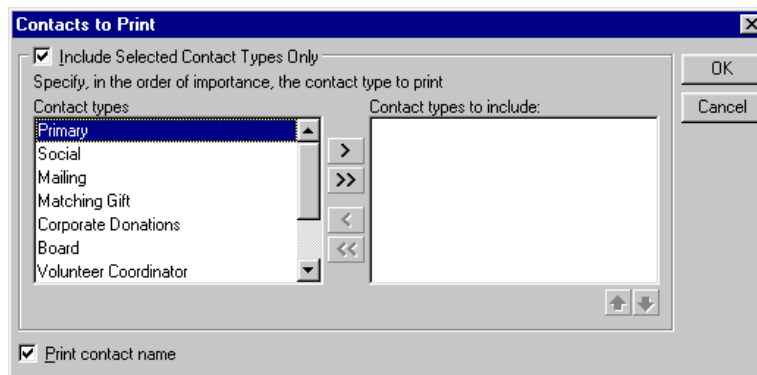
Step 2. If you select in Step 1 to update only the organisation's address, move the address types you want to update from the **Addresses** box to the **Addresses to use** box.

To select the address type to update, highlight an address type in the **Addresses** box and click the single right arrow to move it to the **Addresses to use** box. If you list multiple address types in the **Addresses to use** box, you need to sort the address types in the order of their importance. To move an address type within the **Addresses to use** box, highlight the address type and click the up or down arrow, as necessary. For example, you can include the


Preferred address and the Primary business address types by highlighting them in the **Addresses** box and clicking the single right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to update the Preferred address. Because the program selects the address to update based on its position in the **Addresses to use** box, you need to use the arrows to move the Preferred address to the top of the list.


If you select in Step 1 to **Print contacts**, in Step 2:

- a. You can specify the contact types you want to include by clicking **Contact Information** in Step 2. When you click this button, the **Contacts to Print** screen appears.

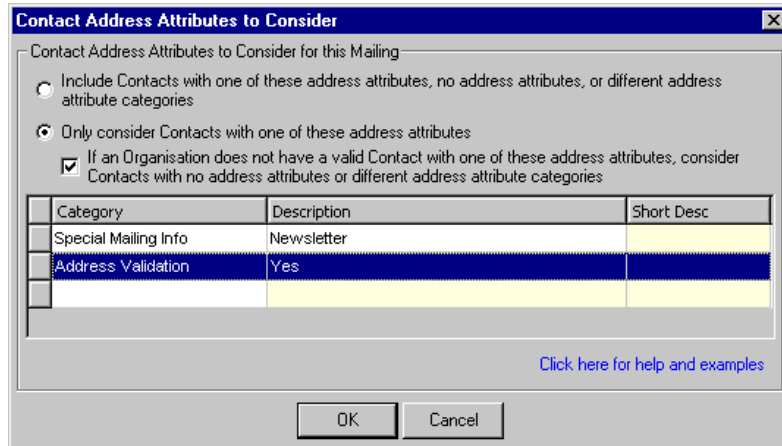


- b. You can include all contact types or choose selected contact types. To select specific contact types, tick the **Include Selected Contact Types Only** checkbox. If you do not tick this checkbox, all contact types are considered for the update. To select the contact type you want to use, highlight the contact type in the **Contact types** box and click the single right arrow to move it to the **Contact types to include** box.
- c. If you list multiple contact types in the **Contact types to include** box, you need to sort the contact types in the order of their importance. To move a contact type within the **Contact types to include** box, highlight the contact type and click the up or down arrow, as necessary. For example, some of your organisations may not have a matching gift coordinator. You can include the contact types Matching Gift Coordinator and Corporate Donations in the report by highlighting them in the **Contact types** box and clicking the single right arrow to move them to the **Contact types to include** box. If an organisation has both contact types on its record, you want to update the address for the Matching Gift Coordinator. Because the program selects the contact type based on its position in the **Contact types to include** box, you need to use the arrows to move the Matching Gift Coordinator to the top of the list.
- d. Tick the **Print contact name** checkbox to print the contact name with the address on the mailing pieces.
- e. Click **OK**. A display appears to the right of the **Contact Information** button listing the contact types you selected. If you did not specify any contact types, the label displays <All contact types>.

 **Contact Address Attributes** entered on the Attributes tab of the Address screen of the contact's relationship record are considered for filters, instead of regular attributes entered on the Attributes/Notes tab of the relationship record. Access the Address Attributes tab by clicking the **Address** button on the General tab of the contact's relationship record. If a contact's address does not qualify for the mailing because of the address attribute filters, the contact is removed from the mailing.

 Ellipses appear at the end of the display if the contact types you selected do not fit in the area provided.

- f. If you selected in **Step 1** to **Print contacts**, you can include or exclude contacts' addresses based on address attributes by clicking the **Contact Address Attributes** button in Step 2. When you click **Contact Address Attributes**, the Contact Address Attributes to Consider screen appears.



Category	Description	Short Desc
Special Mailing Info	Newsletter	
Address Validation	Yes	

- g. You can select an address attribute category and description that must be present on an address to be considered for the update. For example, if you want to include addresses with the address attribute category of Mailing Address and a description of Lost Address, enter the information on this screen. For more information about entering address attributes on a record, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. When you finish entering contact address attributes, click **OK**. A display appears to the right of the **Contact Address Attributes** button and lists the attributes you selected. When you do not specify any address attributes, the label displays <No contact address attributes specified>.

For detailed information about how to use contact address attributes, see the *Mail Guide* or click the help link on the screen.

Step 3. If you select in Step 1 to update only the organisation's address, click the **Address Attributes** button if you want to include or exclude addresses based on attributes. For more information about address attributes, see the Biographical Information chapter of the *Constituent Data Entry Guide*. When you click **Address Attributes**, the Address Attributes to Consider screen appears.

On this screen, you can select an attribute category and description that must be present on an address record in order for the address to be considered for the update. For example, to update addresses with the attribute category of Mailing Address and a description of Lost Address, enter the information on this screen. For more information about entering attributes, click **Constituent Records, Managing Attributes** on the Contents tab of the help file. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.


If you select in Step 1 to **Print contacts**, in Step_3, select what the program should do if it cannot find an address for the contact meeting your selections in Steps 1 or_2.

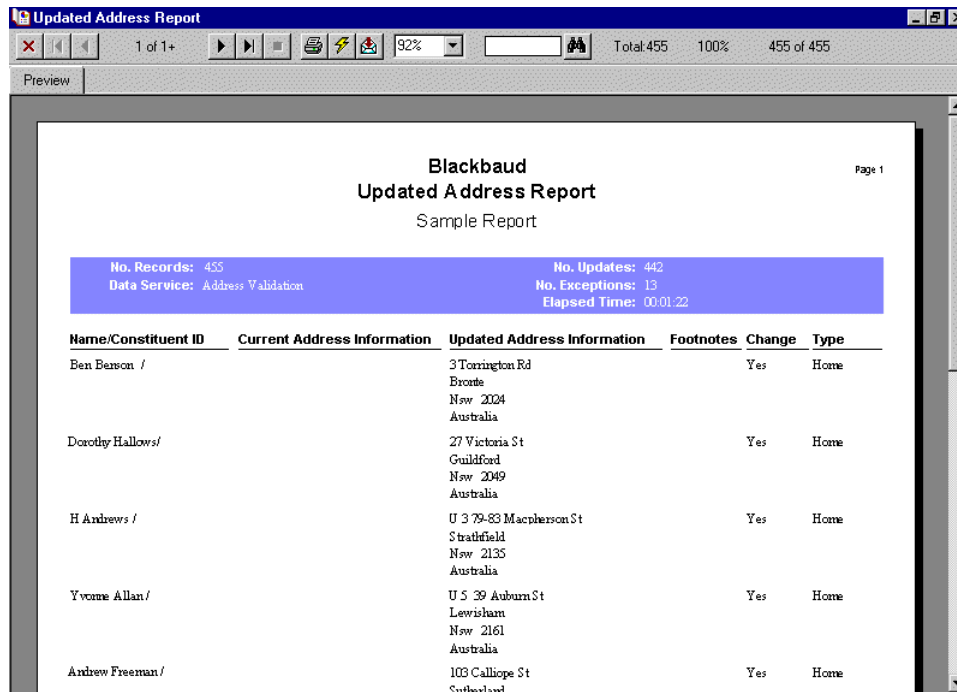
Step 4. In Step 4, you need to select what the program should do if it cannot find an address for the organisation or contact meeting your selections in Steps 1 through 3. You can select to include the preferred address, the first address listed on the Addresses tab of a constituent record, the primary business address, the primary spouse business address, or all user-defined address types.

Updated Address Report

The Updated Address Report compares address information from the *Address Validation* files with the addresses in your database. We recommend you run this report before you update addresses in your database to keep a record of the addresses that were updated and changed. It also may be helpful to keep track of what the former address was.

The Updated Address Report includes the constituent name and ID, current and updated address, address type, and additional information about the address update. For each address, the report also includes the footnotes assigned by *Address Validation*.

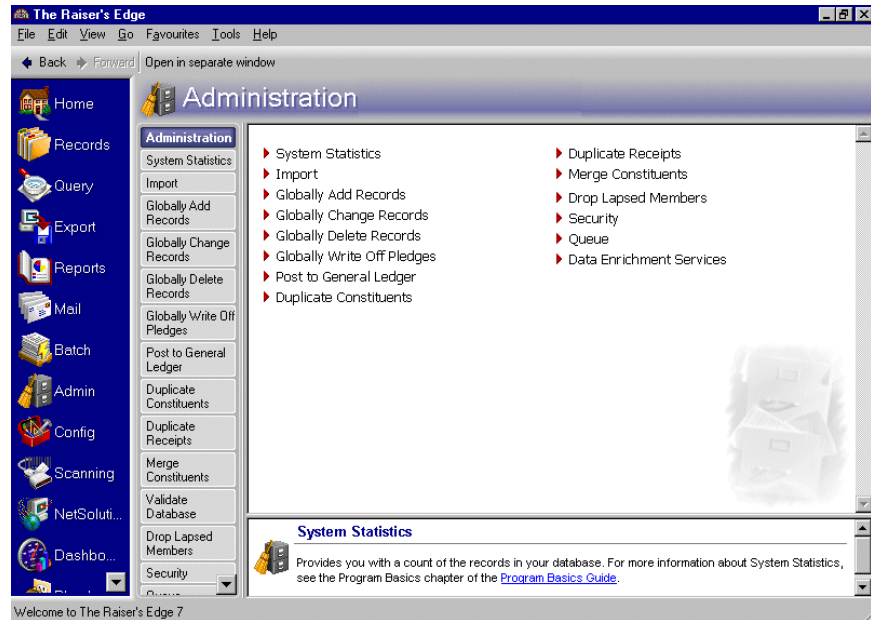
 The Updated Address Report does not make any changes to the addresses in your database.



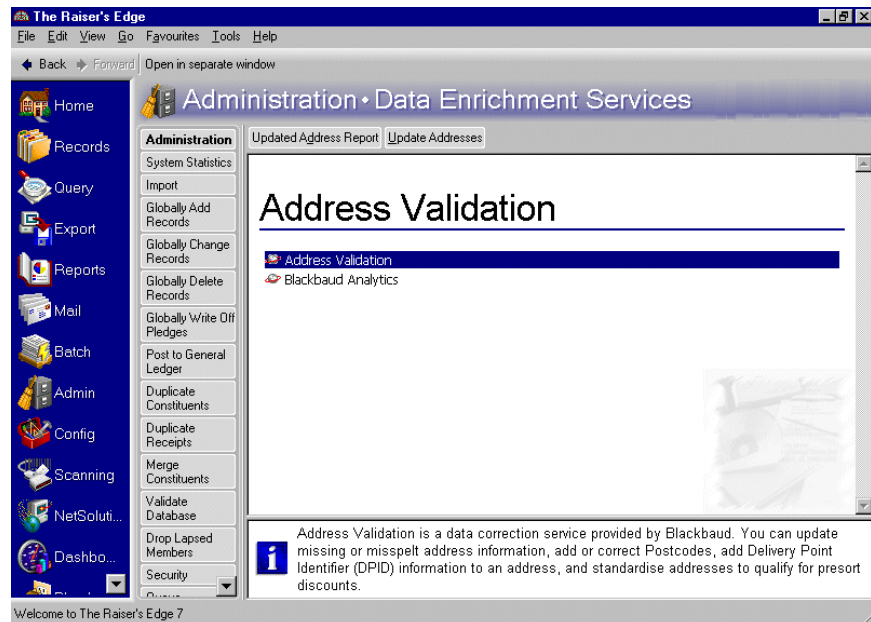
Name/Constituent ID	Current Address Information	Updated Address Information	Footnotes	Change	Type
Ben Benson /		3 Torrington Rd Brooke Nsw 2004 Australia		Yes	Home
Dorothy Hallows /		27 Victoria St Guildford Nsw 2049 Australia		Yes	Home
H Andrews /		U 3 79-83 Macpherson St Strathfield Nsw 2135 Australia		Yes	Home
Yvonne Allan /		U 5 39 Auburn St Lewisham Nsw 2161 Australia		Yes	Home
Andrew Freeman /		103 Calliope St Sutherland		Yes	Home

➤ Creating an Updated Address Report

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.




2. Click **Data Enrichment Services**. The Data Enrichment Services page appears. **Address Validation** is highlighted.




- On the action bar, click **Updated Address Report**. The Updated Address Report screen appears.

- To select the constituents whose addresses you want to update, click **Include** at the top of the screen. You can include **All Records**, **Selected Records**, or **One Record**. If you choose **Selected Records**, the Open Query screen appears, so you can select a query containing the constituents whose addresses you want to update. If you select **One Record**, the Open screen for constituents appears, so you can locate the constituent whose address you want to update.

For more information about creating a query, see the Query chapter of the *Query & Export Guide*. For more information about using the Open screen for constituents, see the Program Basics chapter of the *Program Basics Guide*.


 If you include all constituents, “All records” displays to the right of the **Include** button. If you include selected constituents, “Selected constituents” appears to the right of the **Include** button. If you include one constituent, the constituent’s name appears to the right of the **Include** button.

 If you include selected address types, only one address type is updated on each constituent record processed by *Address Validation*. When you include all address types, every address type is updated on each constituent record processed by *Address Validation*.

- To choose whether to compare all or selected address types for the constituents you selected, in the **Addresses to Certify** frame, click **Include**. If you choose **Selected addresses**, the Customisation Options for Addresses to Include screen appears, so you can select the address types you want to compare in the Updated Addresses Report. For more information, see “Selecting an Address Type” on page 12.

- After selecting a specific address type to update, click **OK**. You return to the Updated Address Report screen. If you include all address types, “All addresses” displays to the right of the **Include** button. If you include selected address types, “Selected addresses” appears to the right of the **Include** button.
- In the **Address to Certify** frame, select the addresses in your database to validate, based on when they were last certified. The available options are as follows.
 - **Regardless of when last certified** - any addresses, regardless of when they were last certified
 - **Not certified using current subscription data** - those addresses that have not yet been updated using the data files from the most recent CD
 - **Not certified using previous subscription data** - those addresses that were not certified using the data files from the CD you received just prior to the current CD
- In the **Report options** field, select whether you want to **Print** or **Preview** the Updated Address Report. If you select **Preview**, a preview screen of the report appears when the process finishes so you can review it before printing.
- To create a static constituent query containing the names of the constituents whose addresses could not be certified, tick the **Create exception query** checkbox. We strongly recommend you tick this checkbox so you can correct the addresses or mark them as a lost address.
- Click **Next**. The Format tab displays fields and checkboxes you can use to format the report.

11. From the list on the left, select **Headings**. The Format tab displays options available for the headings of the Updated Addresses report.
12. In the **Title** field, enter a name for the report. For example, you can enter “Address Validation Updated Address Report”.
13. In the **Subtitle** field, you can enter a secondary or subtitle for the report. For example, you can enter “June Address Update”.
14. In the **Align** field, select how you want the titles aligned on the page. For example, you can choose to align Centre.
15. To print your organisation’s name in the report heading, tick the **Print Organisation name in header** checkbox.
16. To print page numbers in the report, tick the **Print Page Number in heading** checkbox. Then select “Page 1” as the **Format** and **Align** the page numbers Right.
17. To print the date you are running the report at the top of the page, tick the **Print Report Date in Heading** checkbox. **Format** the date as either Short Date or Long Date and choose how you want to **Align** the date on the page.
18. To print the report heading on every page of the report, tick the **Print report heading on each page** checkbox.

 If you include the page number in the heading of the report, you must tick the **Print report heading on each page** checkbox so the page number prints at the top of every page in the report.

Updated Address Report

1: General 2: Format 3: Summary

Headings

- Criteria
- Detail
- Page Footer
- Report Footer
- Colour scheme

Heading Format

Title: Updated Address Report

Subtitle: Sample Report

Align: Centre

Print Organisation name in header

Print Page Number in Heading

Format: Page 1

Align: Right

Print Report Date in Heading

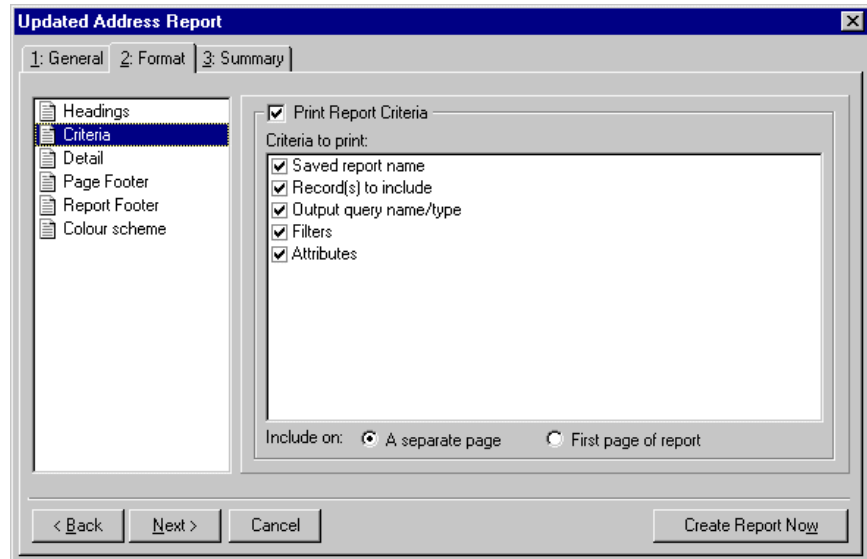
Format: Short Date

Align: Left

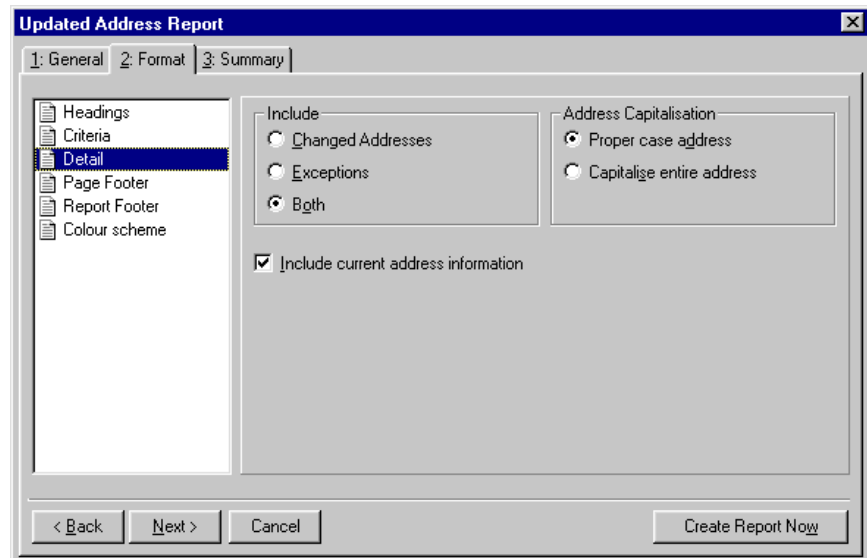
Print report heading on each page

< Back Next > Cancel Create Report Now

19. From the list on the left, select **Criteria**.



20. To print the parameters, or settings, you established for this report to keep for your records, tick the **Print Report Criteria** checkbox. After you tick this checkbox, select the criteria you want to print by ticking the checkbox next to the criteria name. For example, to print the filters used to create this report, tick the **Filters** checkbox. If you print report criteria, select whether you want to print this information on the first page of the report or a separate page.
21. From the list on the left, select **Detail**.



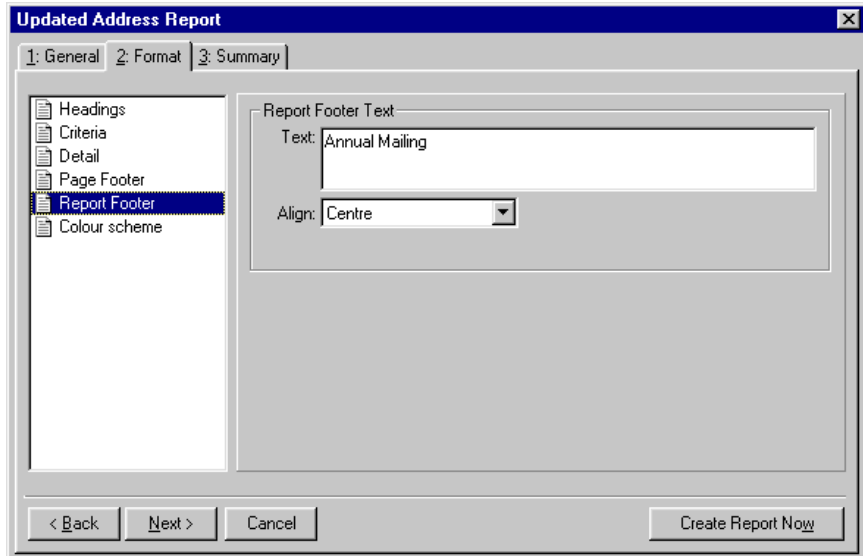
22. In the **Include** frame, select whether to include **Changed Addresses**, **Exceptions**, or **Both** in the Updated Addresses report. If you select **Changed Addresses**, the report includes only addresses that have been modified in the address update. When you select **Exceptions**, the report includes only addresses that generated exceptions and were unable to be corrected. If you select **Both**, changed addresses and exceptions appear in the Updated Address Report.
23. In the **Address Capitalisation** frame, you can choose whether to capitalise the entire address or to use proper case. When you choose **Proper case entire address**, *Address Validation* uses upper and lower case in the appropriate places. Mailings with standardised addresses are eligible for discounts offered by Australia Post. It is strongly recommend the last line is printed in all capital letters. For more information, see the Australia Post publications, *Address Presentation Standards* and the *PreSort Letter Service Guide*. To obtain copies, call 13 13 18 or visit the Web site at www.auspost.com.au.
24. To print the address information currently stored on a constituent record, tick the **Include current address information** checkbox.
25. From the list on the left, select **Page Footer**. On the right, you can enter a page footer, page number, or date that prints at the bottom of every page in the report.

The screenshot shows a dialog box titled "Updated Address Report" with three tabs: "1: General", "2: Format", and "3: Summary". The "2: Format" tab is active. On the left, a tree view shows "Page Footer" selected. The main area contains the following settings:

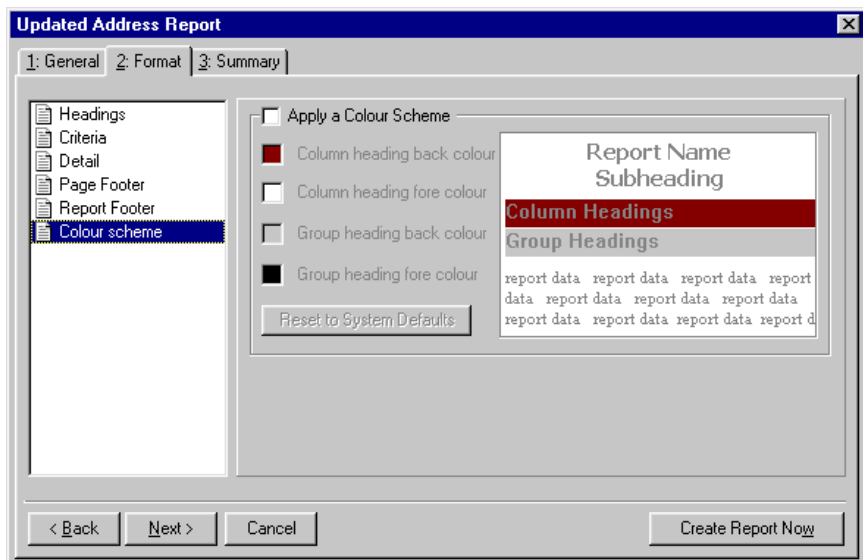
- Page Footer Text:** A text box containing "May 2002 Address Update".
- Align:** A dropdown menu set to "Centre".
- Print Page Number in Footer:** A checked checkbox.
- Format:** A dropdown menu set to "Page 1".
- Align:** A dropdown menu set to "Right".
- Print Report Date in Footer:** A checked checkbox.
- Format:** A dropdown menu set to "Short Date".
- Align:** A dropdown menu set to "Left".

At the bottom, there are buttons for "< Back", "Next >", "Cancel", and "Create Report Now".

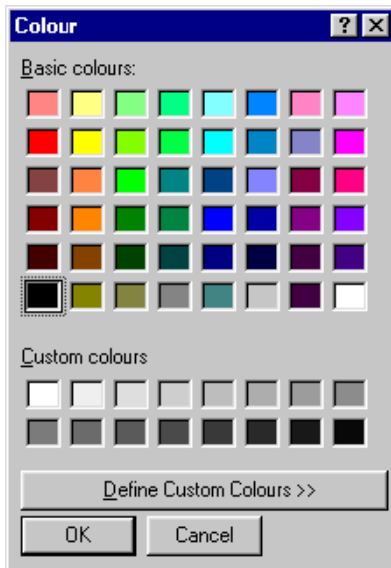
26. From the list on the left, select **Report Footer**. On the right, you can enter text that appears at the bottom of the last page in the Updated Addresses report. In the **Align** field, select whether the program should align the text to the Left, Right, or Centre.



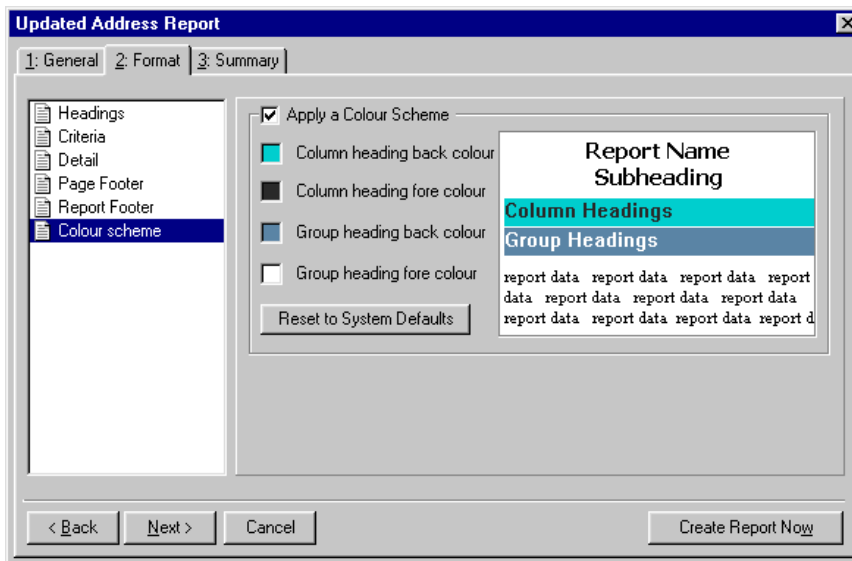
27. From the list on the left, select **Colour scheme**.



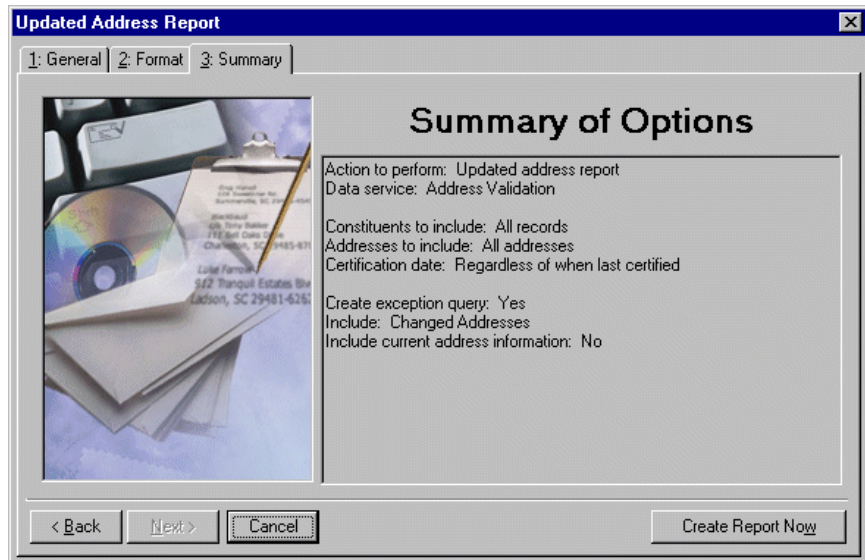
28. To add colour to the headings of the report, tick the **Apply a Colour Scheme** checkbox. To select a colour, click the colour box next to a heading type. The Colour screen appears.



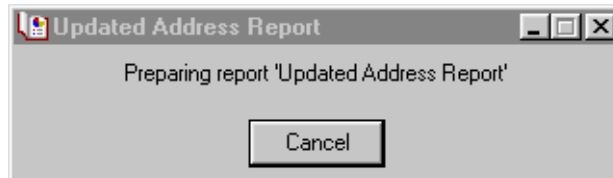
29. Click the colour you want to use and click **OK**. You return to the Updated Address Report screen. Select colours you want to use for the column heading background and foreground colour and the group heading background and foreground colour.



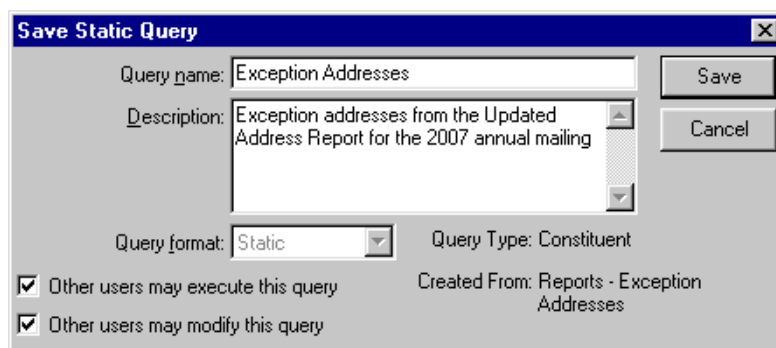
30. Click **Next**. The Summary tab displays a summary of options you selected for the Updated Address report. If the options listed in the summary are not correct, click **Back** to change the options selected.



31. To begin processing the report, click **Create Report Now**. While the program compiles the report, a progress indicator appears. You can click **Cancel** to stop the report processing.



32. If you ticked the **Create output query** checkbox on the General tab, the Save Static Query screen appears.
33. In the **Query name** field, enter a name that describes the contents of this query. For example, you can enter “Exception Addresses”.
34. In the **Description** box, further describe the contents of this query. For example, you can enter “Exception addresses from the Updated Address Report for the 2007 annual mailing”.



35. In the **Query format** field, the program defaults to “Static” and disables the field. Output queries must be static because they do not change. For more information about static queries, see the Query chapter of the *Query & Export Guide*.
36. To allow other users to use or change this query, tick the **Other users may execute this query** and **Other users may modify this query** checkboxes. It may be helpful for others to have access to the queries you create for possible use in the future.
37. Click **Save**. If you selected to preview the Updated Address report, the report previews on screen. You can print this report by clicking **Print** at the top of the preview screen.

Name/Constituent ID	Current Address Information	Updated Address Information	Footnotes	Change	Type
Ben Benson /		3 Torrington Rd Broome Nsw 2024 Australia		Yes	Home
Dorothy Hallows/		27 Victoria St Guildford Nsw 2049 Australia		Yes	Home
H Andrews /		U 3 79-83 Macpherson St Stratfield Nsw 2135 Australia		Yes	Home
Yvonne Allan /		U 5 39 Auburn St Lewisham Nsw 2161 Australia		Yes	Home
Andrew Freeman/		103 Calliope St Sutherland		Yes	Home

If you selected to print the Updated Address report, it prints to your default printer.

38. To close the preview screen, click the “X” in the top right corner. You return to the Data Enrichment Services page.

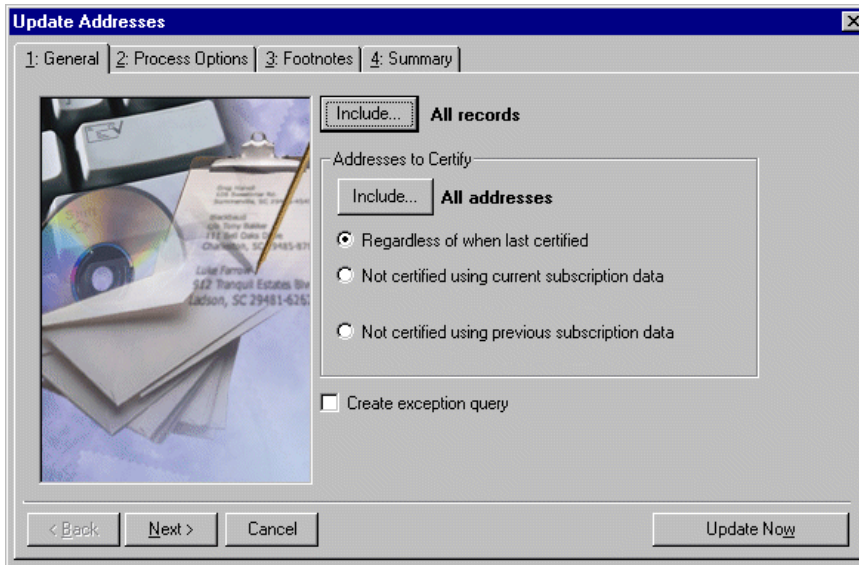
Updating Addresses

Once you verify the information on the Updated Address Report, you are ready to update constituent addresses. You can either update addresses one record at a time using **Interactive** mode or as a group using the **Batch** mode.

Updating Addresses Using Batch Mode

You can verify all addresses in a mailing list at one time using the **Batch mode**. When you use **Batch mode**, you select preferences for address certification that apply to all addresses in the mailing list. The program updates all the addresses without any further data entry.


- On the action bar, click **Update Addresses**. The Update Addresses screen appears.



- To select the constituents whose addresses you want to update, click **Include** at the top of the screen. You can include **All Records**, **Selected Records**, or **One Record**. If you choose **Selected Records**, the Open Query screen appears, so you can select a query containing the constituents whose addresses you want to update. If you select **One Record**, the Open screen for constituents appears, so you can locate the constituent whose address you want to update.

For more information about creating a query, see the Query chapter of the *Query & Export Guide*. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

- In the **Addresses to Certify** frame, click **Include** to choose whether to compare all or selected address types for the constituents you selected.

 If you include all constituents, “All records” displays to the right of the **Include** button. If you include selected constituents, “Selected constituents” appears to the right of the **Include** button. If you include one constituent, the constituent’s name appears to the right of the **Include** button.



If you include selected address types, only one address type is updated on each constituent record processed by *Address Validation*. When you include all address types, every address type is updated on each constituent record processed by *Address Validation*.


If you choose **Selected addresses**, the Customisation Options for Addresses to Include screen appears, so you can select the address types you want to compare in the Updated Addresses Report. For more information, see “Selecting an Address Type” on page 12.


6. After selecting a specific address type to update, click **OK**. You return to the Update Addresses screen. If you include all address types, “All addresses” displays to the right of the **Include** button. If you include selected address types, “Selected addresses” appears to the right of the **Include** button.
7. In the **Address to Certify** frame, select the addresses in your database to validate, based on when they were last certified. The available options are as follows.
 - **Regardless of when last certified** - any addresses, regardless of when they were last certified
 - **Not certified using current subscription data** - those addresses that have not yet been updated using the data files from the most recent CD
 - **Not certified using previous subscription data** - those addresses that were not certified using the data files from the CD you received just prior to the current CD
8. To create a static constituent query containing the names of the constituents whose addresses could not be updated, tick the **Create exception query** checkbox. We strongly recommend you tick this checkbox, so you can correct the addresses or mark them as lost addresses.

9. Click **Next**. The Process Options tab displays options you must specify before you can update the addresses.


10. In the **Processing Mode** frame, select **Batch mode**. When you choose **Batch mode**, the program updates all the addresses at one time. If an address cannot be updated, an exception query is created.
11. In the **Address Capitalisation** frame, choose whether to capitalise the entire address or use proper case. When you choose **Proper case address**, *Address Validation* uses upper and lower case in the appropriate places. Mailings with standardised addresses are eligible for discounts offered by Australia Post. It is strongly recommend the last line is printed in all capital letters. For more information, see the Australia Post publications, *Address Presentation Standards* and the *PreSort Letter Service Guide*. To obtain copies, call 13 13 18 or visit the Web site at www.auspost.com.au.
12. To print the AMAS Report to confirm the addresses are correct and certified, in the **Reporting Options** frame, tick the **Print AMAS form** checkbox. The AMAS Report is required to accompany your mailing to qualify for postal discounts. The AMAS Report proves to the post office the software you used is AMAS-certified and also details the percentage of certified addresses in your mailing.
13. To create a report containing information about the updated addresses, in the **Reporting Options** frame, tick the **Create control report** checkbox. If you tick this checkbox, select whether to **Print** or **Preview** the report. If you select **Preview**, a preview screen of the report appears, so you can view it before printing.

The control report contains the constituent name and ID, address and type, report date, and an exception code where applicable for each constituent processed by *Address Validation*. We recommend you print a control report, so you can have a record of the addresses that were updated.

 When you use a mail task in *Mail*, you can tick the **Print mailing in ALL CAPS** checkbox on the Format tab if you want to modify the case for a specific mailing without changing the capitalisation of the addresses entered on the constituent record. For more information, see the *Mail Guide*.

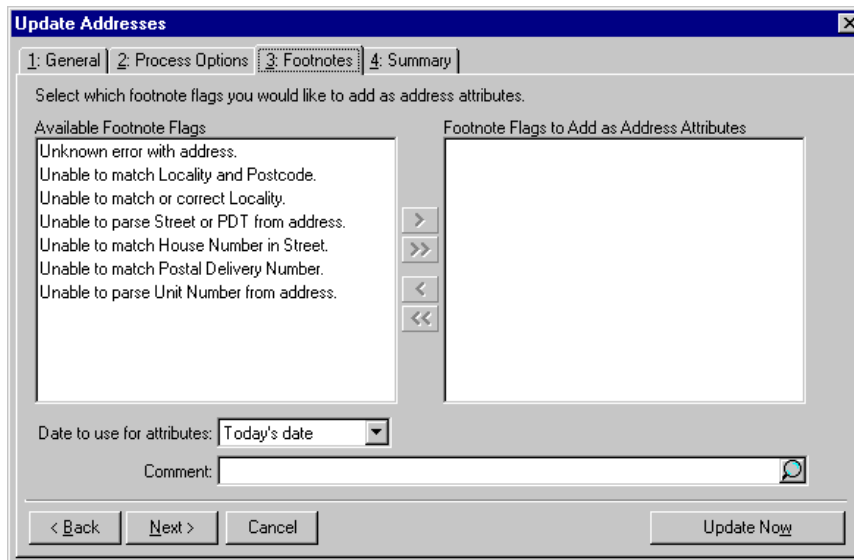
 Any information you enter in the **Add the Following to New Certified Addresses** frame and the **Save Old Address in Constituent Address List** frame is added for all addresses processed in the update.

14. In the **Add the Following to New Certified Addresses** frame, enter the **Address type**, **Info source**, **Date from**, and **Date to** information you want to add in the corresponding fields in the **Address Information** frame on the Address screen of a constituent record. You can leave any of the fields in this frame blank if you do not want to update the information for an address on the constituent record. For more information about the address screen of a constituent record, see the Biographical Information chapter of the *Constituent Data Entry Guide*.
15. If you want to save the original address on the Addresses tab of a constituent record, tick the **Save Old Address in Constituent Address List** checkbox. When you tick this checkbox, enter the **Address type**, **Info source**, **Date from**, and **Date to** information for the old address.

 When updating all addresses for a constituent in Batch mode, we strongly recommend you do not enter information in the **Address type** field in the **Add the Following to New Certified Addresses** frame. All addresses for the constituent are changed to the type you select.

You can leave any of the fields in the **Save Old Address in Constituent Address List** frame blank if you do not want to change the information entered for the original address. For example, if an address has “Personal friend” entered in the **Info source** field, you can leave the **Info source** field in the **Save Old Address in Constituent Address List** frame blank if you do not want to update the information.


16. Click **Next**. On the Footnotes tab, you can specify the footnote flags you want to add as address attributes.



17. To select a footnote flag to add as an address attribute, highlight the footnote flag in the **Available Footnote Flags** box and click the single right arrow to move it to the **Footnote Flags to Add as Address Attributes** box.

To move all footnote flags at once, click the double right arrow. We recommend you use all possible footnote flags in your address update.

The footnote flags appear as address attributes on the Attributes tab of the address record with the **Category** of Address Validation Footnote and a **Description** of the specific footnote flag that applies to the address. After you finish certifying addresses, you need to locate all addresses with an attribute **Category** of Address Validation Footnote and correct any problems with them. After correcting an address, we recommend deleting the attribute.

 If an attribute with the **Category** of Address Validation Footnote already exists on a constituent's address, the existing attribute is not updated, but the additional attribute is added to the grid.

18. If you add any footnote flags as address attributes, enter a date to associate with the attribute in the **Date to use for attributes** field. When you select <Specific date>, the **Date to use** field appears, so you can enter a date, such as 31/05/2007. In the **Comment** field, enter any comments you want to associate with the attribute. For example, you may want to add the comment “Footnote flag from address update on 31/05/2007.”

Update Addresses

1: General | 2: Process Options | 3: Footnotes | 4: Summary

Select which footnote flags you would like to add as address attributes.

Available Footnote Flags

Footnote Flags to Add as Address Attributes

- Unknown error with address.
- Unable to match Locality and Postcode.
- Unable to match or correct Locality.
- Unable to parse Street or PDT from address.
- Unable to match House Number in Street.
- Unable to match Postal Delivery Number.
- Unable to parse Unit Number from address.

Date to use for attributes: Today's date

Comment: May address update for Annual Mailing

< Back | Next > | Cancel | Update Now

19. Click **Next**. The Summary tab displays a summary of options you selected. If the options listed in the summary are not correct, click **Back** and make your changes.

Update Addresses

1: General | 2: Process Options | 3: Footnotes | 4: Summary

Summary of Options

Action to perform: Update addresses
Data service: Address Validation


Constituents to include: All records
Addresses to include: All addresses
Certification date: Regardless of when last certified

Create exception query: No
Proper case address

Create control report: Yes (Preview)

Add the following to new addresses:
Address type: Certified Address
Info source: Address Validation
Date from: 31/05/2007

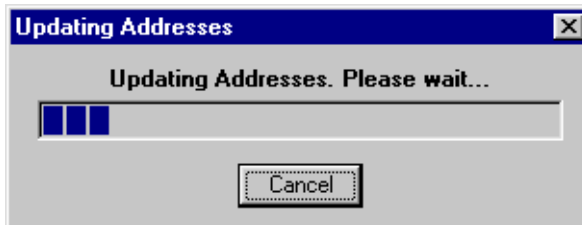
< Back | Next > | Cancel | Update Now

 Addresses other than Australian-formatted are included in processing, but fail the first test and are not considered for further processing against the exception rules.

20. To begin updating the addresses in your mailing list, click **Update Now**.
21. If you ticked the **Create exception query** checkbox on the General tab, the Save Static Query screen appears.
22. In the **Query name** field, enter a name that describes the contents of this query. For example, you can enter “Exception Addresses”.

23. In the **Description** box, further describe the contents of this query. For example, you can enter “Exception addresses for the 2007 annual mailing”.

24. In the **Query format** field, the program defaults to “Static” and disables the field. Output queries must be static because they do not change. For more information about static queries, see the Query chapter of the *Query & Export Guide*.
25. To allow other users to use or change this query, tick the **Other users may execute this query** and **Other users may modify this query** checkboxes. It may be helpful for others to have access to the queries you create for possible use in the future.
26. Click **Save**. The Updating Addresses message appears.



27. When the program finishes updating addresses in your database, a summary screen appears, displaying the results of the update.

Total addresses processed:	29
Number of updates:	9
Number of exceptions:	19
Number skipped:	0

A 'Close' button is at the bottom.

28. To close the summary screen and complete the address update, click **Close**.

Updating Addresses Using Interactive Mode

When you choose to update addresses in your database using Interactive mode, the Address Validation screen appears for each address you choose to validate. From this screen, you can change all or part of the address entered in your database with the certified address.

If there is enough valid address information for the program to automatically update and validate the address, the Address Validation screen appears. For example, if you are missing the postcode, but all other address information is correct, the Address Validation screen appears with the updated postcode. You do not need to search for the entire correct address on the Postcode Browser screen.

If an address cannot be certified, the Postcode Browser screen appears over the Address Validation screen, so you can search for a correct address. Once you find and select an address to use on the Postcode Browser screen, you return to the Address Validation screen so you can update the address permanently in your database. For more information, see “Address Validation Screen” on page 38. For information about searching for correct addresses, see “Postcode Browser Screen” on page 40.

Address Validation Screen

From the Address Validation screen, you can update the corrected address in the database.

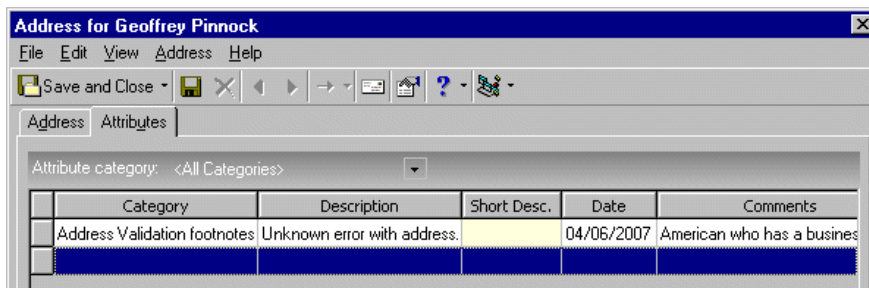
Current Address Information. The **Current Address Information** frame lists the address information currently entered on the constituent record.

Address, Suburb, State, Postcode. The address fields on the left of the screen contain the updated address information you select on the Postcode Browser screen. Or, if the address cannot be updated, these fields contain the same information entered on the constituent record. This information also appears in the **Current Address Information** frame above.

DPID. DPID stands for Delivery Point Identifier, which is an eight-digit code that *Address Validation* adds to your address, when available. A DPID included on mail pieces qualifies your mailings for further postal discounts and gets them to their intended destinations sooner.

Add footnote as an address attribute. Tick the **Add footnote as an address attribute** checkbox to copy a footnote flag to the constituent record as an address attribute. If you are not able to validate an address, footnote flags indicate the reason the address cannot be validated. The footnote flag appears as an address attribute with the **Category** of Address Validation Footnote and a **Description** of the footnote flag.

Footnote flag field. The field below the **Add footnote as an address attribute** checkbox contains the reason, or footnote flag, an address cannot be validated. For example, it may say Invalid address. If you tick the checkbox above, this footnote is recorded on the address record as an address attribute so you can track it or do further research later.



Date To Use. When you add an address attribute for an address, in the **Date To Use** field, select the date you want to enter in the **Date** field of the attributes grid.

Comment. In the **Comment** field, enter any comments you want to associate with the attribute. For example, you may want to add the comment "Footnote flag from address update on 01/01/2007".

Validate. Click **Validate** to validate the address in the address fields in the frame at the bottom of the screen, making it eligible for discounts. An address can be validated only if it is correct and is entered in proper case. If the address that appears is validated, or certified, the **Validate** button is disabled.

Copy original address to alternate. Tick this checkbox if you want to add the old address to the Addresses tab on the constituent record with an **Indicator** of Alternate.

Update Address. Click **Update Address** to update the address in your database.

Skip. Click **Skip** to skip updating the current address on the screen. You go to the next address. The Process Complete screen at the end of the address update tells you how many records were skipped.

Auto. Click **Auto** to switch to updating addresses using Batch mode. Once you change from Interactive mode to Batch mode, you cannot switch back again.

Cancel. When you click **Cancel**, a message appears asking if you are sure you want to cancel. If you click **Yes**, the Process Complete screen appears, summarising the records processed so far. When you close that screen, you return to the Data Enrichment Services screen.

Postcode Browser Screen

Before you can update an address on the Address Validation screen, you need to use the Postcode Browser screen to search for the correct address. The Postcode Browser screen appears when the address is invalid or when you click **Validate** on the Address Validation screen for an address that cannot be certified.

The bottom portion of the Postcode Browser screen lists all available street names for the criteria entered in the address fields in the **Find Criteria** frame on the top right of the screen. The address entered on the constituent record or in the batch defaults into the address fields in the **Find Criteria** frame.

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 236 KEILLOR ROAD
NIDDRIE VIC

Find Criteria: Locality Line: NIDDRIE VIC

Street/Delivery Name: 236 KEILLOR ROAD

Updated Address: 326 Keilor Rd
Niddrie VIC 3042

Results: Select a result address below and click "Update" to send the address back.

Unit	Floor	Number	Lot Number	Building 1	Building 2	Point Indicator	ID
		326				Real	34985645
		328				Real	61504912
		330				Real	38482551
		330C					56499804
		332				Real	67472883
		332A					38285053
		334				Phantom	78757184
U 1		334					42664260
U 10		334					52231818
U 11		334					51334831

Original Address. The **Original Address** frame lists the existing address on the constituent record.

Find Criteria. The **Find Criteria** frame includes all address fields. Enter information in these fields to search for the correct address to use. The existing address information defaults into these fields. Delete information in one or more fields to broaden your search for better results.

Locality Line - contains the Suburb and associated State/Territory and Postcode

Street/Delivery Name - contains the street name and number

Update. Click **Update** once you find and select the address to use from the list on the bottom of the screen. You return to the Address Validation screen.

Cancel. Click **Cancel** to cancel the address find. You return to the Address Validation screen.

Clear. Click **Clear** to remove all information from the fields in the **Find Criteria** frame.

Update Address. Click **Update Address** when you find the correct address to update in the database and return to the Address Validation screen.

Unit. A Unit represents a unit at a particular address, such as an apartment.
Example: U 1.

Floor. Floor specifies a certain floor number in an address, when applicable.

Number. Number refers to the street number in the address.

Lot Number. A lot number refers to a property before there has been a street number officially assigned to the address. The Lot number appears before the street name, when applicable. Example: LOT 17 Skye Avenue.

Building 1 & Building 2. These columns represent lines one and two, respectively, of a building number in an address, when applicable.

Point Indicator. The Primary Point is an individual street address that contains no secondary information, although it may have associated secondary address information. Primary Points are flagged as either Real or Phantom, which appears in the **Point Indicator** column in the grid.

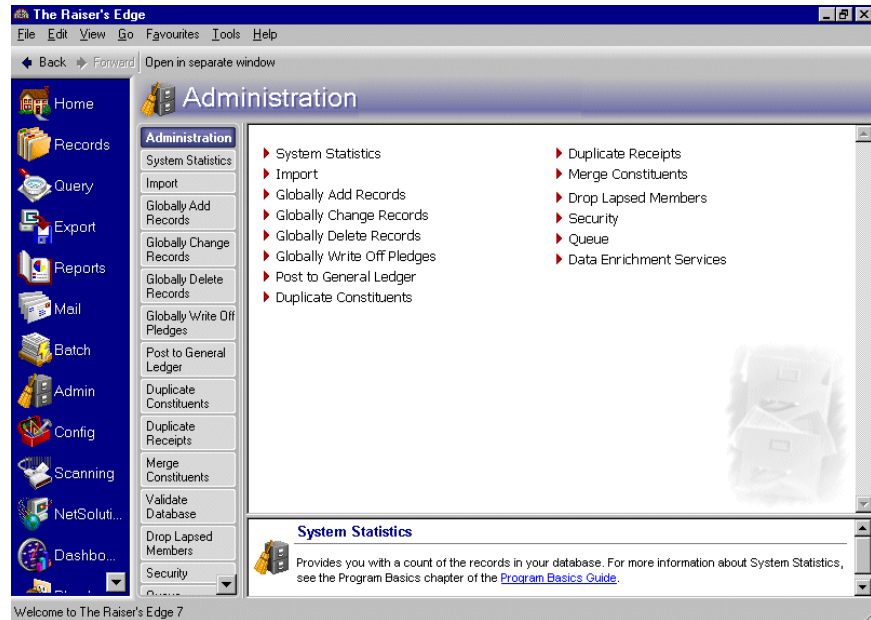
A Real Primary Point is an existing physical delivery address without secondary information (although it may have associated secondary address information). An example Real Primary Point address is 3122 ELM ST. Real Primary Points are considered address records in their own right.

A Phantom Primary Point is a delivery point that does not physically exist or will not legitimately have mail sent to the primary address. Phantom Primary Points have associated secondary address information, such as UNIT 1, (suffix) A, or FLOOR 5. Phantom points assist in the address matching process. Phantom Primary Points are not considered address records in their own right.

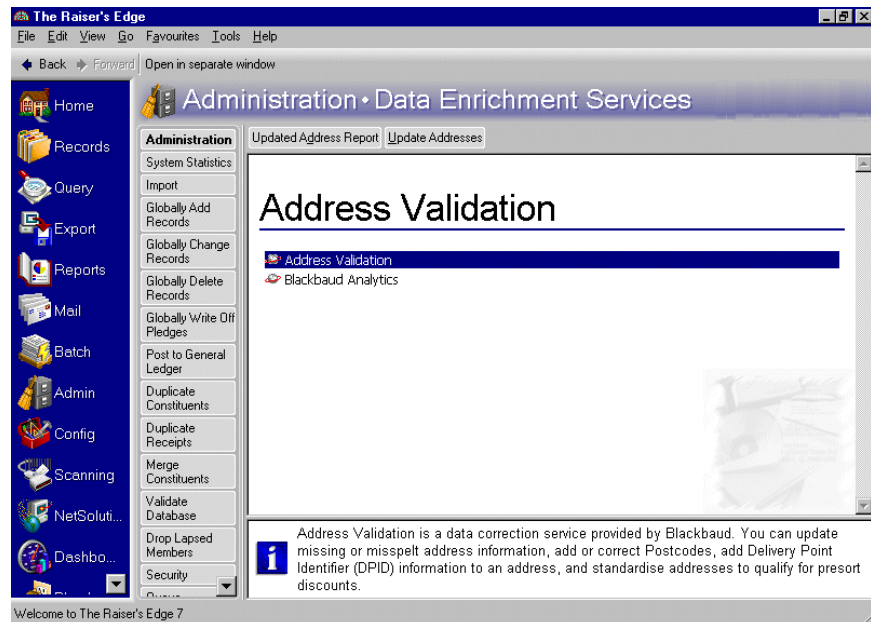
ID. The ID column contains the DPID for the particular address.
Example: 38285053.

➤ Updating addresses in the database using Interactive mode

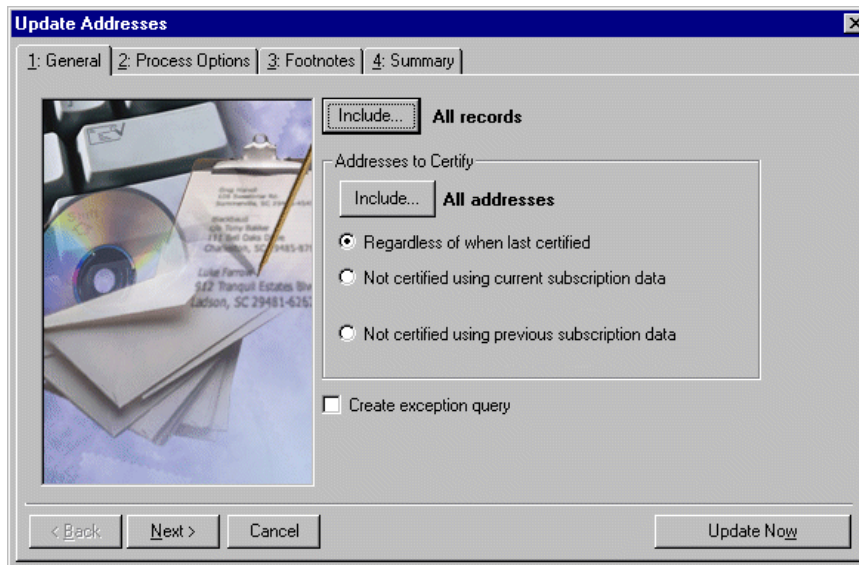
1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.



2. Click **Data Enrichment Services**. The Data Enrichment Services page appears. **Address Validation** is highlighted.




- On the action bar at the top of the Data Enrichment Services page, click **Update Addresses**. The Update Addresses screen appears.




- To select the constituents whose addresses you want to update, click **Include** at the top of the screen.

You can include **All Records**, **Selected Records**, or **One Record**. If you choose **Selected Records**, the Open Query screen appears, so you can select a query containing the constituents whose addresses you want to update. If you select **One Record**, the Open screen for constituents appears, so you can locate the constituent whose address you want to update.

For more information about creating a query, see the Query chapter of the *Query & Export Guide*. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

 If you include all constituents, “All records” displays to the right of the **Include** button. If you include selected constituents, “Selected constituents” appears to the right of the **Include** button. If you include one constituent, the constituent’s name appears to the right of the **Include** button.

- In the **Addresses to Certify** frame, click **Include** to choose whether to compare all or selected address types for the constituents you selected. If you choose **Selected addresses**, the Customisation Options for Addresses to Include screen appears, so you can select the address types you want to compare in the Updated Addresses Report. For more information, see “Selecting an Address Type” on page 12.


 If you include selected address types, only one address type is updated on each constituent record processed by *Address Validation*. When you include all address types, every address type is updated on each constituent record processed by *Address Validation*.


- After selecting a specific address type to update, click **OK**. You return to the Update Addresses screen. If you include all address types, “All addresses” displays to the right of the **Include** button. If you include selected address types, “Selected addresses” appears to the right of the **Include** button.
- In the **Addresses to Certify** frame, select the time period you want to use to determine whether the program should validate an address. You can choose to validated addresses based on when they were last certified.
- To create a static constituent query containing the names of the constituents whose addresses could not be updated, tick the **Create exception query** checkbox. We strongly recommend you tick this checkbox so you can correct the addresses or mark them as lost addresses.

9. Click **Next**. The Process Options tab displays options, checkboxes, and fields you must specify before you can update the addresses.

10. In the **Processing Mode** frame, select **Interactive mode**. When you select **Interactive mode**, you can view each address before accepting the changes.
11. In the **Address Capitalisation** frame, choose whether you want to capitalise the entire address or use proper case. When you choose **Proper case address**, *Address Validation* uses upper and lower case in the appropriate places. Mailings with standardised addresses are eligible for discounts offered by Australia Post. It is strongly recommend the last line is printed in all capital letters. For more information, see the Australia Post publications, *Address Presentation Standards* and the *PreSort Letter Service Guide*. To obtain copies, call 13 13 18 or visit the Web site at www.auspost.com.au.
12. To print the AMAS Report to confirm the addresses are correct and certified, in the **Reporting Options** frame, tick the **Print AMAS form** checkbox. The AMAS Report is required to accompany your mailing to qualify for postal discounts. The AMAS Report proves to the post office the software you used is AMAS-certified and also details the percentage of certified addresses in your mailing.
13. In the **Reporting Options** frame, tick the **Create control report** checkbox to create a report containing information about the updated addresses. If you tick this checkbox, select whether to **Print** or **Preview** the report. If you select **Preview**, a preview screen of the report appears, so you can view it before printing.

The control report contains the constituent name and ID, address and type, report date, and an exception code where applicable for each constituent processed by *Address Validation*. We recommend you print a control report, so you can have a record of the addresses that were updated.

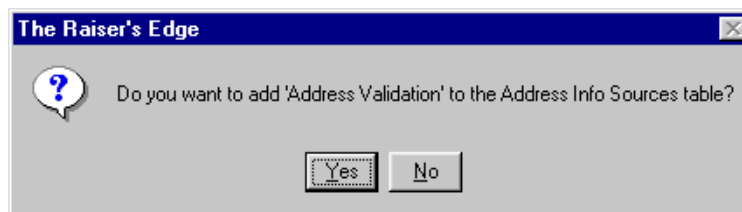
 When you use a mail task in *Mail*, you can tick the **Print mailing in ALL CAPS** checkbox on the Format tab if you want to modify the case for a specific mailing without changing the capitalisation of the addresses entered on the constituent record. For more information, see the *Mail Guide*.

 When updating all addresses for a constituent, we strongly recommend you do not enter information in the **Address type** field in the **Add the Following to New Certified Addresses** frame because all addresses for the constituent are changed to the type you select.

14. In the **Add the Following to New Certified Addresses** frame, enter the **Address type**, **Info source**, **Date from**, and **Date to** information you want to add in the corresponding fields in the **Address Information** frame on the Address screen of a constituent record. You can leave any of the fields in this frame blank, if you do not want to update the information for an address on the constituent record. For example, in the **Address type** field, select “Home”.

For more information about the Address screen, see the Biographical Information chapter of the *Constituent Data Entry Guide*.

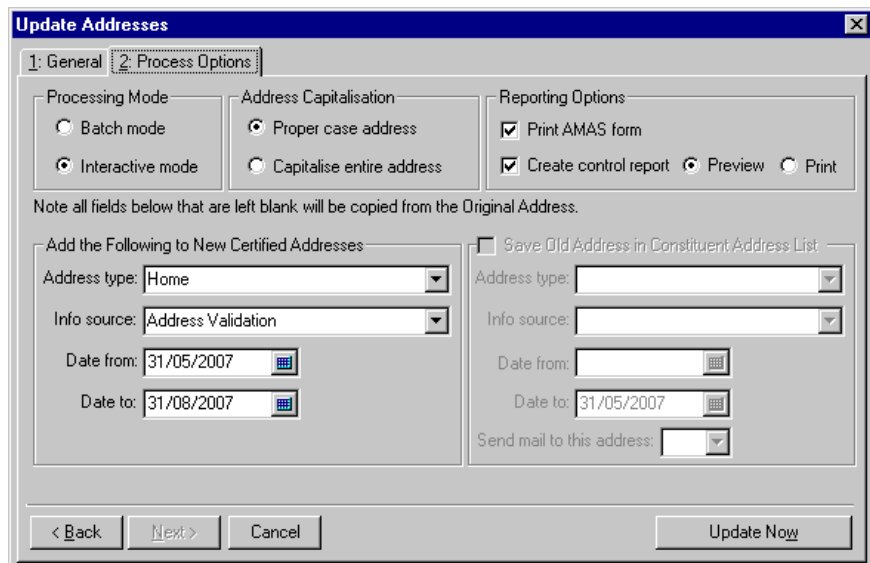
15. The **Info source** field notes where you got your address changed information. In the **Info source** field enter “Address Validation”. When you leave the field, the following message appears.



16. To add this selection to the table, click **Yes**.

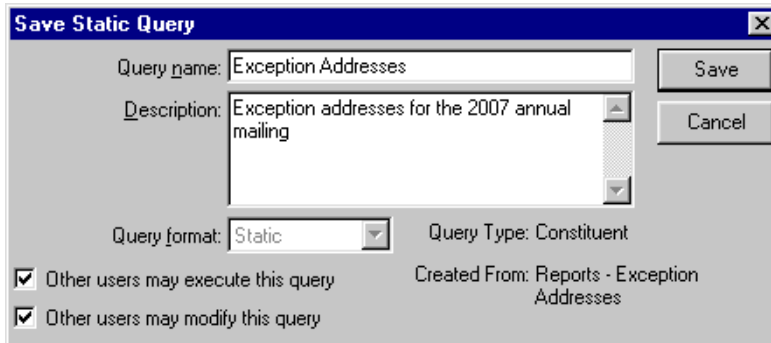
Because you are updating addresses now, today’s date defaults into the **Date from** field.

17. In the **Date to** field, enter through when you want this address update to be valid. For example, your organisation updates addresses regularly every three months to keep your database current and correct, enter the date “31/08/2007”.




The frame on the right is disabled when you select **Interactive mode**. When using Interactive mode, you make these selections on the Address Validation screen.

18. To begin updating the addresses in your mailing list, click **Update Now**.
19. If you ticked the **Create output query** checkbox on the General tab, the Save Static Query screen appears.



The screenshot shows a dialog box titled "Save Static Query". It has a "Query name" field with the text "Exception Addresses". Below it is a "Description" text area containing "Exception addresses for the 2007 annual mailing". There is a "Query format" dropdown menu currently set to "Static". To the right, it says "Query Type: Constituent". At the bottom left, there are two checked checkboxes: "Other users may execute this query" and "Other users may modify this query". To the right of these is the text "Created From: Reports - Exception Addresses". On the right side of the dialog, there are "Save" and "Cancel" buttons.

20. In the **Query name** field, enter a name that describes the contents of this query. For example, you can enter "Exception Addresses".
21. In the **Description** box, further describe the contents of this query. For example, you can enter "Exception addresses for the 2007 annual mailing".
22. In the **Query format** field, the program defaults to "Static" and disables the field because output queries must be static. For more information about static queries, see the Query chapter of the *Query & Export Guide*.
23. To allow other users to use or change this query, tick the **Other users may execute this query** and **Other users may modify this query** checkboxes. It may be helpful for others to have access to the queries you create for possible use in the future.

 Addresses other than Australian-formatted are included in processing, but fail the first test and are not considered for further processing against the exception rules.

24. Click **Save**. The program begins to validate addresses. The Address Validation screen appears for each address in the list.

Address Validation

Current Address Information

Constituent ID:
 Address Type: Home
 Address: 9 Boondall St
 Suburb: BOONDALL
 State: Que Postcode: 4034 DPID: 54407912

Choose the 'Update Address' button to update the current address information shown above with the validated address displayed below.

Address: 9 Bondal St Add footnote as an address attribute
 Suburb: Bondal
 State: QLD Date To Use: Today's date
 Postcode: 4034 DPID: 54407912 Comment:

Copy original address to alternate

25. Click **Validate**. If the existing address cannot be certified, the Postcode Browser screen appears, so you can search for a correct address. The existing address information defaults into the fields in the **Find Criteria** frame.

Postcode Browser

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 9 BONDAL ST
 BONDAL QLD 4034

Find Criteria: Locality Line: BONDAL QLD 4034
 Street/Delivery Name: 9 BONDAL ST

Updated Address:

Results: Select a result address below and click "Update" to send the address back.

Locality	State	Postcode
BOONDALL	QLD	4034
BOONDALL HEIGHTS	QLD	4034

If the Postcode Browser finds a possible correct address, it appears in the **Updated Address** display.

If no possible addresses matching the criteria in the **Find Criteria** frame appear at the bottom of the screen, you need to adjust your criteria to broaden your search for possible correct addresses. The less criteria you enter, the broader your search results.

26. Highlight the row in the grid at the bottom of the screen that matches the address information entered in the **Locality Line** and **Street/Delivery Name** field. For the example below, the address was spelled incorrectly when it was entered in the database and that is why it could not be found or certified. Double-click the first row in the grid to correct the **Locality Line** of your search criteria. The updated address information fills in the **Locality Line**.

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 9 BONDAL ST
BONDAL QLD 4034

Find Criteria: Locality Line: BOONDALL QLD 4034
Street/Delivery Name: 9 BONDAL ST

Buttons: Find, Cancel, Clear

Updated Address: _____

Results: Select a result address below and click "Update" to send the address back.

Delivery Type	Street Name	Street Type	Street Suffix
	BOONDALL	ST	

27. Highlight the street name closest to the one you are looking for in the grid at the bottom of the screen and click **Find**. All possible addresses for that street appear in the grid.

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 9 BONDAL ST
BONDAL QLD 4034

Find Criteria: Locality Line: BOONDALL QLD 4034
Street/Delivery Name: BOONDALL ST

Buttons: Update, Cancel, Clear

Updated Address: 3 Boondall St
Boondall QLD 4034

Results: Select a result address below and click "Update" to send the address back.

Unit	Floor	Number	Lot Number	Building 1	Building 2	Point Indicator	ID
		3				Real	33181430
		5				Real	51509565
		7				Real	36161694
		9				Real	54407912
		10				Real	44367780
		11				Real	96304712
		12				Real	39426790
		13				Real	65611696
		14				Real	78986042
		16				Real	96341116

28. Scroll down and highlight the address in the grid for which you are searching. You can reference back to the **Original Address** display to see the original address that was entered in the database.

Postcode Browser

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 9 BONDAL ST
BONDAL QLD 4034


Find Criteria: Locality Line: BOONDALL QLD 4034

Street/Delivery Name: BOONDALL ST

Updated Address: 9 Boondall St
Boondall QLD 4034

Results: Select a result address below and click "Update" to send the address back.

Unit	Floor	Number	Lot Number	Building 1	Building 2	Point Indicator	ID
		3				Real	33181430
		5				Real	51509565
		7				Real	36161694
		9				Real	54407912
		10				Real	44367780
		11				Real	96304712
		12				Real	39426790
		13				Real	65611696
		14				Real	78986042
		16				Real	96341116

 The fields at the bottom of the screen are editable. You can enter or change address information in these fields and then click **Validate** to validate the address information you enter.

29. Click **Update**. The Address Validation screen appears with the updated address information you selected on the Postcode Browser screen.

Address Validation

Current Address Information

Constituent ID:

Address Type: Home

Address: 9 Boondall St

Suburb: BOONDALL

State: Que Postcode: 4034 DPID 54407912

Choose the 'Update Address' button to update the current address information shown above with the validated address displayed below.

Address: 9 Boondall St Add footnote as an address attribute

Suburb: Boondall

State: QLD Queensland Date To Use: Today's date

Postcode: 4034 DPID 54407912 Comment:

Copy original address to alternate

If you are not able to validate an address, tick the **Add footnote as an address attribute** checkbox on the Address Validation screen. The field below contains a footnote flag to indicate the reason the address could not be certified. The footnote flag appears as an address attribute with the **Category** of Address Validation Footnote and a **Description** of the footnote flag on the Attributes tab of the Address screen accessed from the constituent record. You can later search for addresses marked with these address attributes that could not be certified and research them further.

30. If you add any footnote flags as address attributes, enter a date to associate with the attribute in the **Date to Use** field. When you select <Specific date>, the **Date to Use** field appears, so you can enter a date, such as 31/05/2007.
31. In the **Comment** field, enter any comments you want to associate with the attribute. For example, you may want to add the comment “Footnote flag from address update on 31/05/2007”.
32. To update the address on a constituent record, click **Update Address**. If the **Update Address** button is disabled, the address entered in the **Current Address** frame is not a certifiable address.

The next address in the database appears on the Address Validation screen.
33. Continue following these steps for each address to be processed. If you cannot validate an address for a constituent, click **Skip**.
34. If you want to switch from certifying addresses using **Interactive mode** to certifying addresses using **Batch mode**, click **Auto**. When you switch to Batch mode, *Address Validation* goes through and certifies addresses automatically. You do not see each screen or have access to manually change the addresses from the address update. For more information about Batch mode, see “Updating Addresses Using Batch Mode” on page 29.

35. When you finish updating addresses, if you selected to **Preview** or **Print** a control report in the **Reporting Options** frame on the Process Options tab, an Update Address Report preview screen appears. The Update Address Report lists the addresses you updated and the available footnotes. If you select **Preview**, a preview screen of the report appears, so you can view it before printing.

08/04/2002 Blackbaud
Update Address Report Page 1

No. Records: 452 No. Updates: 420
Data Service: Address Validation No. Exception: 22

Name/Client ID	Current Address Information	Updated Address Information	Footnote	Change	Type
N Albou	74 Daley St GUILDFORD NSW 2161 Australia	74 Daley Rd GUILDFORD NSW 2161 Australia		Yes	House
Allan Daniels	1 Bibbelslake St SUTHERLAND NSW 2232 Australia	10 Bibbelslake Ave SUTHERLAND NSW 2232 Australia		Yes	House
Mal Affard	39 Callage St MANKLY NSW 2095 Australia	68 39 Callage St MANKLY NSW 2095 Australia		Yes	House
Jane Andrews	13 Auburn St DUFFYS FOREST NSW 2024 Australia	103 Auburn St DUFFYS FOREST NSW 2024 Australia		Yes	House
Eve Abbey	PO Box GREENACRE NSW 2190 Australia	PO Box 121 GREENACRE NSW 2190 Australia		Yes	House
Andrew Joby	24 Sylvanus MERRIDY	24 Sylvanus St MERRIDY		Yes	House

36. To print the Update Address Report from the preview screen, click **Print** on the toolbar.
37. To close the Update Address Report preview screen, click the “X” in the top right corner.


38. If you ticked the **Print AMAS form** checkbox in the **Reporting Options** frame on the Process Options tab, the AMAS report prints to your default printer. The AMAS report needs to accompany your mailing to prove a certain percentage of your mailing has certified addresses, in order to qualify for postal discounts.

AMAS Address Matching Processing Summary Report	
A. AMAS Software Details	
1. AMAS Certified Company Name Satori Software, Inc	2. Software Name MailRoom ToolKit
3. Software Approval Date 28/5/2007	4. Software Version 2.1
B. Database/List Owners Details	
1. List Processor's Name	2. Date List Processed June 03, 2007
3. Processed Against PAF Version V2002_3	4. Name of Address List Blackbaud
C. Processing Results	
1. Records Matched & DPID Appended 14	2. Records Amended & DPID Appended 426
3. Records Not Matched 12	4. Total Records Processed 452
D. Signature of Compliance	
1. Name, Address, & Phone number of mailer Blackbaud	I Certify that this information is true and accurate-
	2. Signature of Mailer
	3. Date Signed

39. When you finish certifying addresses in your database and printing reports, if you selected to do so, the Process Complete screen appears, displaying the results of the update.



40. To close the summary screen and complete the address update, click **Close**. You return to the Data Enrichment Services page.

 You can access *Address Validation* from constituent, participant, relationship, and address records.

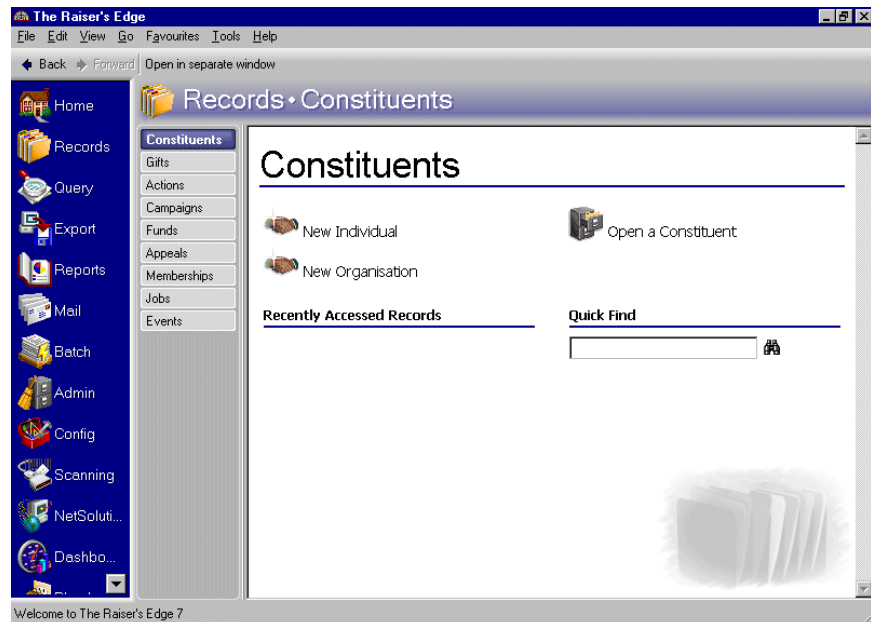
Correcting Addresses from a Record

You can look up and correct a specific address directly from a constituent, participant, relationship or address record using *Address Validation*. When you update an address from a record using *Address Validation*, the corrected address is AMAS certified, qualifying your mailing for discounts.

You can access the address lookup screen from a record in several places: from the **Constituent, Address Validation** menu on the constituent record; through the **Address, Address Validation** menu on the Address screen of a constituent record; or by clicking the **Address Validation** button on the toolbar of the record. You can correct and validate the primary address or any other address type on the constituent record.

➤ Correcting an address from a constituent record

1. On the Raiser's Edge bar, click **Records**.
2. Click the **Constituents** link. The Constituents page appears.



3. From a constituent record, select the Bio 1 tab.

Doris Richardson

File Edit View Constituent Letter Favourites Tools Help

Save and Close

Media Actions Honour/Memorial Volunteer Prospect Membership Events

Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts Attributes

Biographical

Surname: Richardson Aliases

First name: Doris

Middle name:

Titles: Mrs

Suffixes:

Nickname: Dot

Maiden name:

ID: 235

Gender: Female ID2:

Birth date: 08/14/1950 Age: 54

Deceased? Date:

Marital status: Married

Spouse: Gary Richardson

Solicit code: End of year mailing only

Preferred Address - Home

Country: United States More...

Address lines: 236 Keillor Road

City: NIDDRIE

State: VIC Victoria

ZIP: DPC:

Phones/Email/Links		
Type	Number/Email Address	Shared?
Home	041-855-3801	Not Shared

This constituent

Is inactive Is a solicitor Details

Gives anonymously Has no valid addresses

Requests no email

Education Business Bank

To correct and validate the primary address on the Bio 1 tab, you can select **Constituent, Address Validation** from the menu bar of the constituent record. To validate any other address, open the address record from the Addresses tab and select **Constituent, Address Validation** from the menu bar of the Address screen.

4. In the **Preferred Address** frame on the right, click **More**. The Address screen appears.

Address for Doris Richardson

File Edit View Address Help

Save and Close

Address Attributes

Country: Australia

Address lines: 236 Keillor Road

Suburb: NIDDRIE

State: VIC Victoria

Postcode: DPID:

Phones/Email/Links		
Type	Number/Email Address	Shared?
Home	041-855-3801	Not Shared

Address Information

Address type: Home

Info source:

County:

Region:

CART:

Send mail to this address

Set this address to the preferred address

Valid Dates

Seasonal Address

Date from: Seasonal from:

Date to: Seasonal to:

Address block: 236 Keillor Road
NIDDRIE
VIC

Press F7 for table lookup, F8 for address validation

To correct an address, you can also click the **Address Validation** button on the toolbar or select **Constituent, Address Validation** from the menu bar of the constituent record.

- On the toolbar, click the **Address Validation** button. You can also select **Address, Address Validation** from the menu bar of the Address screen.

Addresses other than Australia-formatted are included in processing, but fail the first test and are not considered for further processing against the exception rules. For example, you cannot update from the *Address Validation* data files a constituent's address if it is a United States address.

If the address cannot be certified, the Postcode Browser screen appears.

Unit	Floor	Number	Lot Number	Building 1	Building 2	Point Indicator	ID
		326				Real	34985645
		328				Real	61504912
		330				Real	38482551
		330C					56499804
		332				Real	67472883
		332A					38285053
		334				Phantom	78757184
U 1		334					42664260
U 10		334					52231818
U 11		334					51334831


The address entered on the constituent record defaults into the address fields in the **Find Criteria** frame at the top right of the screen. The frame at the bottom of the Postcode Browser screen lists all possible street names falling within the parameters you define in the **Find Criteria** frame.

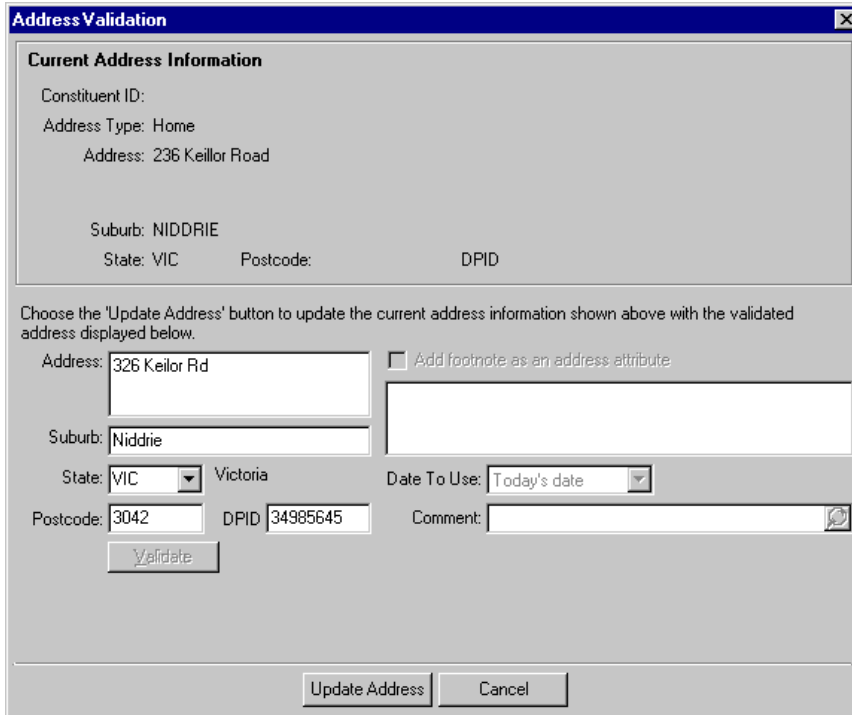
If the Postcode Browser finds a possible correct address, it appears in the **Updated Address** display.

6. Scroll through the list that appears in the grid at the bottom of the screen until you find the address you need.

To broaden your search, remove some search criteria from the **Find Criteria** frame.

7. When you find the correct address, highlight it and click **Update**. The Address Validation screen appears.

 You can remove all information in these fields by clicking the **Clear** button on the right.



Address Validation

Current Address Information

Constituent ID:
Address Type: Home
Address: 236 Keillor Road

Suburb: NIDDRIE
State: VIC Postcode: DPID

Choose the 'Update Address' button to update the current address information shown above with the validated address displayed below.


Address: 326 Keilor Rd Add footnote as an address attribute

Suburb: Niddrie

State: VIC Victoria Date To Use: Today's date

Postcode: 3042 DPID: 34985645 Comment:

The original address entered on the constituent record, before you searched for the correct one, appears for viewing purposes only in the **Current Address Information** frame at the top of the Address Validation screen.

 Address information will not validate if it does not meet Australia Post standards. For example, the second last line of an address must contain the number and name of the street. Australia Post also strongly recommends the last line be printed in all capital letters. You can still update an address on a constituent record if it is not certified. However, to qualify for the greatest discounts on your mailings, we recommend you use certified addresses. For more information about addressing standards, see the Australia Post publications, *Address Presentation Standards* and the *PreSort Letter Service Guide*. To obtain copies, call 13 13 18 or visit the Web site at www.auspost.com.au.

The updated address information you selected on the Postcode Browser screen appears in the editable address fields at the bottom of the screen. You can change information in these fields, such as capitalisation, if you want. Because this information is taken directly from the Postcode Browser screen, it is already certified. Therefore, the **Validate** button is disabled.

8. To update the address on the constituent record, click **Update Address**. You return to the Address screen with the updated and certified address information filled in the appropriate fields.

Type	Number/Email Address	Shared?
Home	041-855-3801	Not Shared

Address block: 236 Keilor Road
NIDDRIE
VIC

Notice how the address will appear on mailings in the **Address block** at the bottom of the screen.

9. On the toolbar, click **Save**. If the address is linked to another address, a message appears telling you so.

This address is shared with at least one other record.

Change this address on all records that share this address

Change the address on this record only (this address will not be shared with any other records)

OK Cancel Show Shared Addresses >>

- To update the address, make your selection and click **OK**. You return to the Address screen with the **Address block** updated. For more information about linked (shared) addresses, see the Constituent Mailing Information and Relationships chapters of the *Constituent Data Entry Guide*.

Address for Doris Richardson

File Edit View Address Help

Save and Close

Address Attributes

Country: Australia

Address lines: 236 Keilor Road

Suburb: NIDDRIE

State: VIC Victoria

Postcode: 3042 DPID: 34985645

Address Information

Address type: Home

Info source:

County:

Region:

CART:

Send mail to this address

Set this address to the preferred address

Valid Dates

Date from: Seasonal from:

Date to: Seasonal to:

Seasonal Address

Phones/Email/Links		
Type	Number/Email Address	Shared?
Home	041-855-3801	Not Shared

Address block: 236 Keilor Road
NIDDRIE
VIC 3042

- To save the changes and close the address record, click **Save and Close** on the toolbar. You return to the Bio 1 tab of the constituent record.
- To save the changes and close the constituent record, click **Save and Close** on the toolbar.

Postcode Lookup with Address Validation

With the data correction service, *Address Validation*, in addition to address correction, you can look up postcodes. The address lookup feature provides a quick and easy way to match a correct suburb, state, and postcode for an address.

If you need to look up only the suburb, state, or postcode for an address on a constituent record, you can easily access the Address Lookup screen by clicking the binoculars in the **Postcode** field on the Address screen of a constituent record.

The screenshot shows a dialog box titled "Address Lookup" with a close button (X) in the top right corner. It contains a table with three columns: "City", "State", and "ZIP". The first row is highlighted in blue and contains "Arcadia", "VIC", and "3631". The second row contains "Arcadia South", "VIC", and "3631". To the right of the table are two buttons: "Open" and "Cancel". Below the table, there is a section labeled "Search criteria:" with three input fields: "City:" with the text "ARCADIA", "State:" with a dropdown menu showing "VIC" and "Victoria" next to it, and "ZIP:" with an empty text box. To the right of these fields is a "Find Now" button.

City	State	ZIP
Arcadia	VIC	3631
Arcadia South	VIC	3631

Search criteria:

City:

State: Victoria

ZIP:

➤ Looking up a Postcode from a constituent record



You work in the fundraising office of a listener-supported radio station. You are creating constituent records for all new sponsors who donated during your last fundraising drive. Create a new constituent record for Skye Adams and enter the following address information: 3305 Main Street Sydney, NSW. However, you are not sure of her postcode. Use the Postcode lookup to locate her correct postcode, so that you can include her in the thank-you letter mailing.

1. Create a new constituent record for Skye Adams. For more information about creating a constituent record, see the *Constituent Data Entry Guide*.

The Australia version of *The Raiser's Edge* can only look up Australian address fields.

The screenshot shows the constituent record form for Skye Adams. The form is divided into several sections:

- Biographical:** Surname: Adams, First name: Skye, Middle name: (empty), Titles: Mrs, Suffixes: (empty), Nickname: (empty), Maiden name: (empty), ID: 236, Gender: Female, Birth date: 08/14/1969, Age: 35, Marital status: Married, Spouse: Patrick Adams, Solicit code: (empty).
- Preferred Address : Home:** Country: Australia, Address lines: 3305 E. Main Street, Suburb: SYDNEY SOUTH, State: NSW New South Wales, Postcode: (empty), DPID: (empty).
- Phones/Email/Links:** A table with columns: Type, Number/Email Address, Shared?.
- This constituent:**
 - Is inactive
 - Gives anonymously
 - Requests no email
 - Is a solicitor
 - Has no valid addresses

Buttons at the bottom include Education, Business, and Bank. A footer note says: Press F7 for address lookup, F8 for address validation.

2. In the **Address lines** field, enter the address information you know. For this example, enter “3305 E. Main Street”.
3. In the **Suburb** field, enter “Sydney”.
4. In the **State** field, click the arrow and select or enter “NSW” for New South Wales.

5. In the **Postcode** field, click the binoculars. The Address Lookup screen appears.

The screenshot shows the 'Address Lookup' dialog box. It features a table with three columns: 'City', 'State', and 'ZIP'. The table contains seven rows of data for Sydney, NSW, with ZIP codes 1116, 1126, 1125, 1124, 1123, 1122, and 1121. The first row is highlighted. Below the table, there are search criteria fields: 'City' (SYDNEY), 'State' (NSW), and 'ZIP' (empty). A 'Find Now' button is located to the right of the search criteria. The dialog also has 'Open' and 'Cancel' buttons.

City	State	ZIP
Sydney	NSW	1116
Sydney	NSW	1126
Sydney	NSW	1125
Sydney	NSW	1124
Sydney	NSW	1123
Sydney	NSW	1122
Sydney	NSW	1121

Search criteria:

City: SYDNEY

State: NSW New South Wales

ZIP:

6. Scroll down the list until you find the Postcode you recognise as hers.

The screenshot shows the 'Address Lookup' dialog box. It features a table with three columns: 'City', 'State', and 'ZIP'. The table contains six rows of data for Sydney South, NSW, with ZIP codes 1234, 2000, 1232, 1231, 1235, and 1233. The row with ZIP 1233 is highlighted. Below the table, there are search criteria fields: 'City' (SYDNEY), 'State' (NSW), and 'ZIP' (empty). A 'Find Now' button is located to the right of the search criteria. The dialog also has 'Open' and 'Cancel' buttons.

City	State	ZIP
Sydney South	NSW	1234
Sydney South	NSW	2000
Sydney South	NSW	1232
Sydney South	NSW	1231
Sydney South	NSW	1235
Sydney South	NSW	1233

Search criteria:

City: SYDNEY

State: NSW New South Wales

ZIP:

7. Highlight the Postcode you want to use and click **Open**. You return to the constituent record. The chosen Postcode automatically fills in the **Postcode** field and any other matching address information, such as the **Suburb**, updates.

Skye Adams

File Edit View Constituent Letter Favourites Tools Help

Save and Close

Media Actions Honour/Memorial Volunteer Prospect Membership Events
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts Attributes

Biographical

Surname: Adams Aliases

First name: Skye

Middle name:

Titles: Mrs

Suffixes:

Nickname:

Maiden name:

ID: 236

Gender: Female ID2:

Birth date: 08/14/1969 Age: 35

Deceased? Date:

Marital status: Married

Spouse: Patrick Adams

Solicit code:

Preferred Address - Home

Country: Australia More...

Address lines: 3305 E. Main Street

Suburb: SYDNEY SOUTH

State: NSW New South Wales

Postcode: 1233 DPID:

Phones/Email/Links

Type	Number/Email Address	Shared?

This constituent

Is inactive Is a solicitor Details

Gives anonymously Has no valid addresses

Requests no email

Education Business Bank

Press F7 for address lookup, F8 for address validation

8. In the **Preferred Address** frame, click **More**. The Address record screen appears.

Address for Skye Adams

File Edit View Address Help

Save and Close

Address Attributes

Country: Australia

Address lines: 3305 E. Main Street

Suburb: SYDNEY SOUTH

State: NSW New South Wales

Postcode: 1233 DPID:

Address Information

Address type: Home

Info source:

County:

Region:

CART:

Send mail to this address

Set this address to the preferred address

Valid Dates

Date from: Date to:

Seasonal Address

Seasonal from: Seasonal to:

Address block: 3305 E. Main Street
 SYDNEY SOUTH
 NSW 1233

Press F7 for table lookup, F8 for address validation

9. View the correctly formatted address in the **Address Block** at the bottom of the screen.
10. Click **Save and Close**. You return to the constituent record.
11. Click **Save and Close** to save the information and close the constituent record.

Using Address Validation with Batch

In *The Raiser's Edge*, *Batch* provides an avenue for fast and easy data entry. You can enter multiple new constituents or gifts into your database at one time. With *Address Validation*, you can look up or correct addresses as you enter them in *Batch*, for even more efficient data entry.


Accessing *Address Validation* in *Batch* should not be confused with updating addresses in the database using batch mode. For more information about updating addresses using batch mode, see "Updating addresses in the database using Batch mode" on page 30.

➤ Looking up and correcting a constituent address in Batch

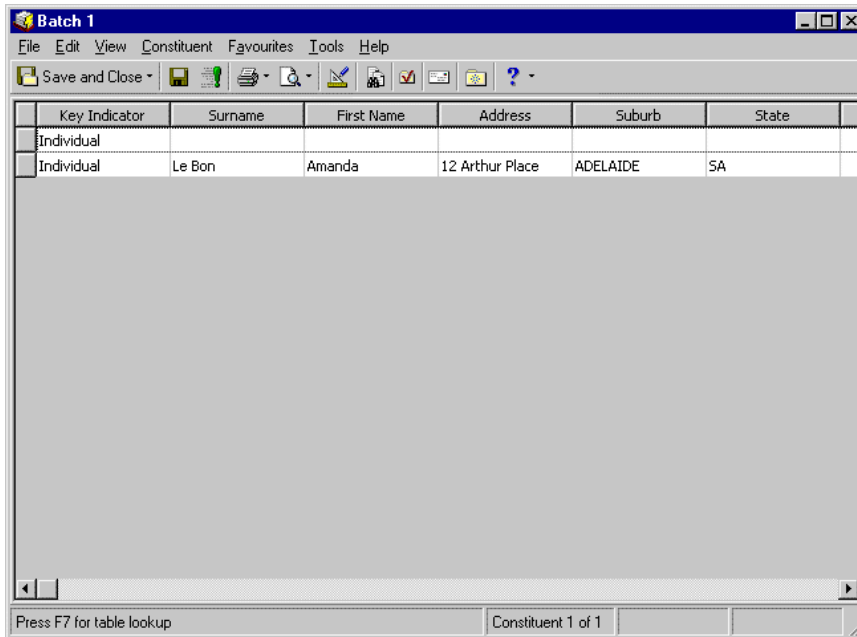


You received a phone call from Amanda Le Bon, requesting information about your organisation. You want to enter her in your database as part of a batch you are creating for all new constituents. Verify the address information you wrote down is correct while entering it in *Batch*.

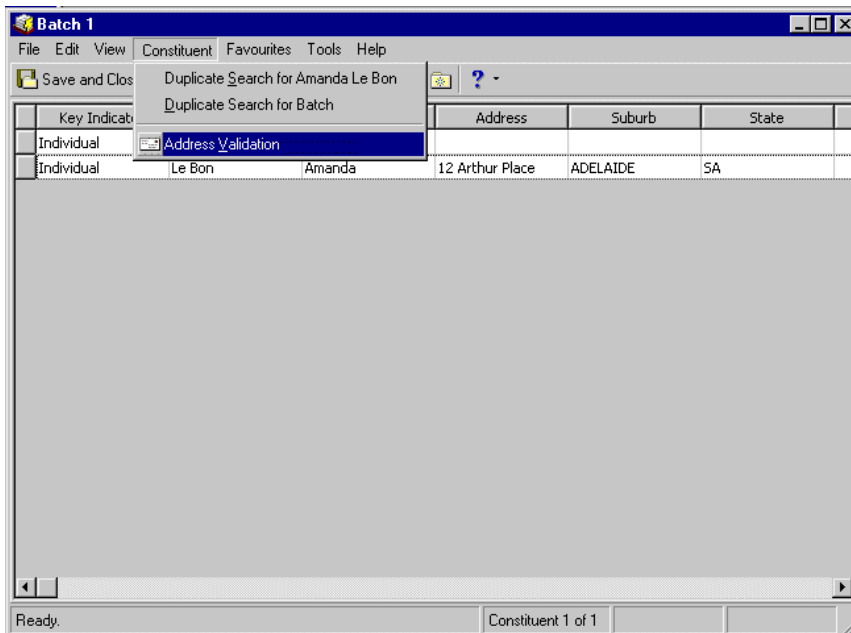
1. Create a new constituent batch containing the fields, "Surname", "First name", "Address", "Suburb", "State", and "Postcode". For more information about *Batch*, see the "Adding Constituents in the Data Entry Grid" section of the Constituent Batch chapter of the *Batch Guide*.
2. On the Batch screen, in the **Surname** column, enter "Le Bon".
3. In the **First Name** column, enter "Amanda".
4. In the **Address** column, enter "12 Arthur Place".
5. In the **Suburb** column, enter "Adelaide".
6. In the **State** column, enter "SA".

 If you want to add footnotes as address attributes, you must select **Address validation footnotes attribute description**, **Address validation footnotes attribute date**, and **Address validation footnotes attribute comment** fields when setting up your Batch (select under **Constituent Information, Address, Attributes**). If you do not, the **Add footnote as an address attribute** checkbox on the Address Validation screen will not become enabled and the footnote will not be recorded as an address attribute.

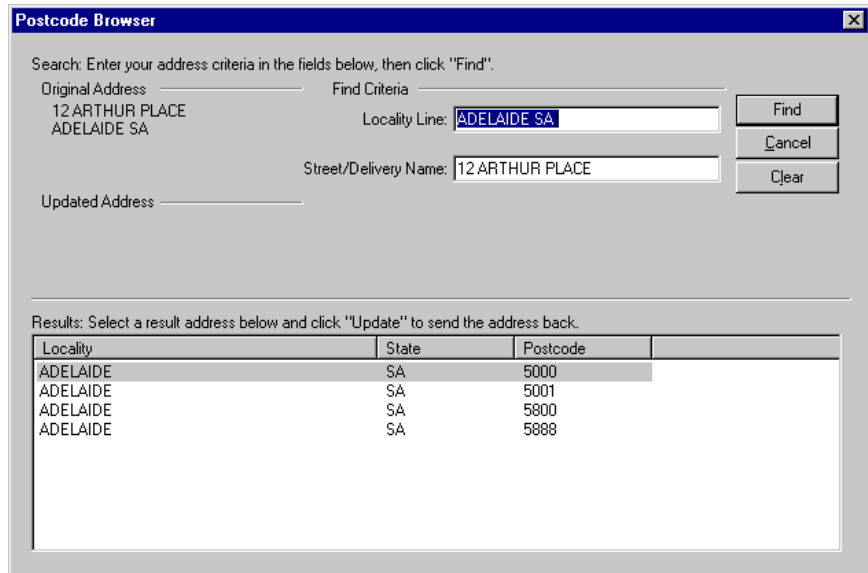
7. In the **Postcode** column, enter “5000”.



8. From the menu bar, select **Constituent, Address Validation**.



The Postcode Browser screen appears.



Postcode Browser

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 12 ARTHUR PLACE
ADELAIDE SA

Find Criteria: Locality Line: ADELAIDE SA

Street/Delivery Name: 12 ARTHUR PLACE

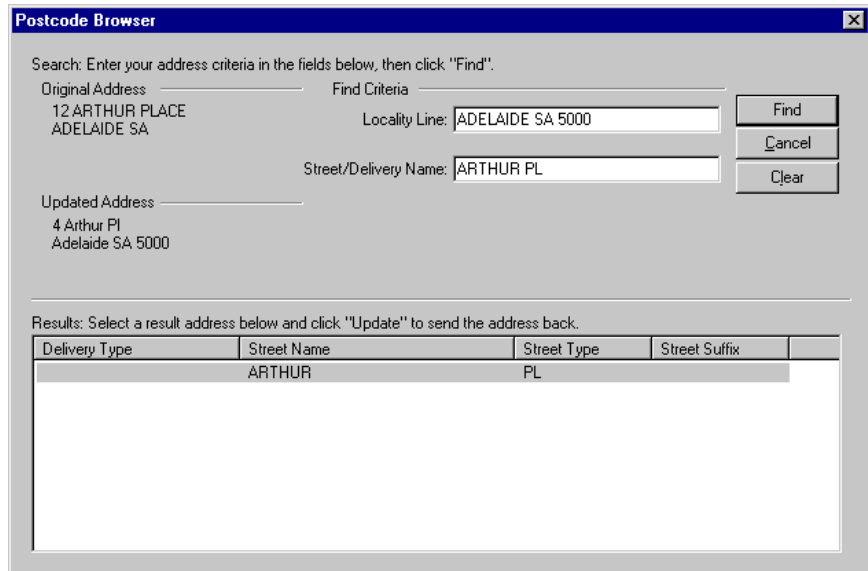
Buttons: Find, Cancel, Clear

Updated Address:

Results: Select a result address below and click "Update" to send the address back.

Locality	State	Postcode
ADELAIDE	SA	5000
ADELAIDE	SA	5001
ADELAIDE	SA	5800
ADELAIDE	SA	5888

9. Because you know Amanda's address is in the 5000 postcode area, double-click the first row in the grid. The street options appear in the grid.



Postcode Browser

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 12 ARTHUR PLACE
ADELAIDE SA

Find Criteria: Locality Line: ADELAIDE SA 5000

Street/Delivery Name: ARTHUR PL

Buttons: Find, Cancel, Clear

Updated Address: 4 Arthur Pl
Adelaide SA 5000

Results: Select a result address below and click "Update" to send the address back.

Delivery Type	Street Name	Street Type	Street Suffix
	ARTHUR	PL	

10. Highlight the ARTHUR PL row in the grid and click **Find**.

Postcode Browser

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 12 ARTHUR PLACE
ADELAIDE SA

Find Criteria: Locality Line: ADELAIDE SA 5000

Street/Delivery Name: ARTHUR PL

Updated Address: 4 Arthur Pl
Adelaide SA 5000

Results: Select a result address below and click "Update" to send the address back.

Unit	Floor	Number	Lot Number	Building 1	Building 2	Point Indicator	ID
		4				Real	77941116

The only possible street number that appears for Arthur Place is “4”. You are looking for “12”.

11. To broaden your search, delete “PL” in the **Street/Delivery Name** field. Only “Arthur” remains. Another possible street name appears in the grid at the bottom, “Arthur Street”.
12. Highlight the Arthur St row and click **Find**. The possible street numbers matching the criteria appear in the grid.

Postcode Browser

Search: Enter your address criteria in the fields below, then click "Find".

Original Address: 12 ARTHUR PLACE
ADELAIDE SA


Find Criteria: Locality Line: ADELAIDE SA 5000


Street/Delivery Name: ARTHUR ST

Updated Address: 12 Arthur St
Adelaide SA 5000

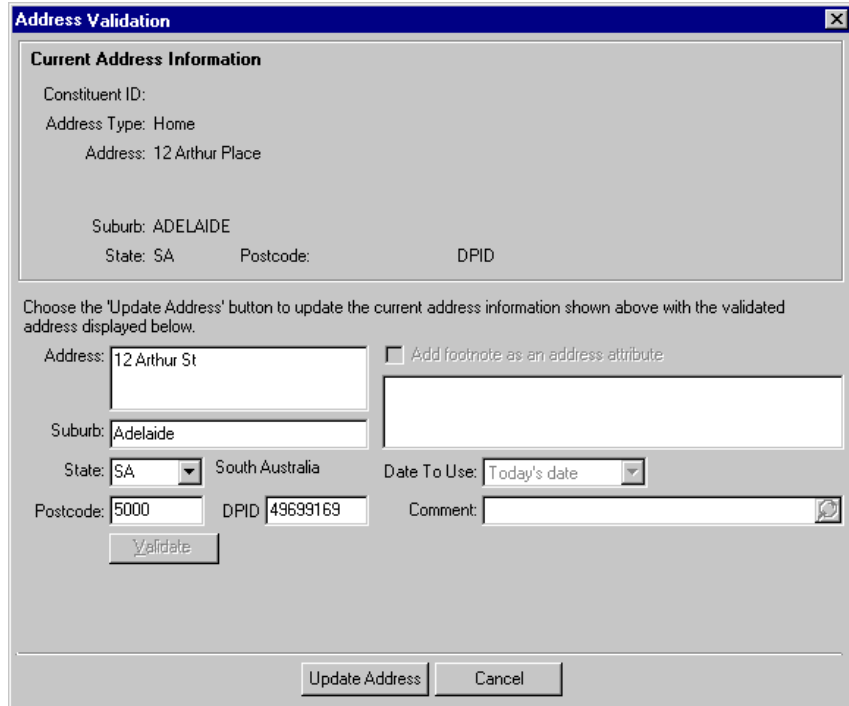
Results: Select a result address below and click "Update" to send the address back.

Unit	Floor	Number	Lot Number	Building 1	Building 2	Point Indicator	ID
		12				Real	49699169
		14				Real	48127312
		16				Real	50353102
		17				Real	33060113
		18				Real	83220629
		19				Real	31259643
		20				Real	77064724

 If you want to add footnotes as address attributes, you must select **Address validation footnotes attribute description**, **Address validation footnotes attribute date**, and **Address validation footnotes attribute comment** fields when setting up your Batch (select under **Constituent Information**, **Address**, **Attributes**). If you do not, the **Add footnote as an address attribute** checkbox on the Address Validation screen will not become enabled and the footnote will not be recorded as an address attribute.

 For more information about committing and validating batches, see the *Batch Guide*.

13. You realise the street type was simply entered wrong and the correct address should be “12 Arthur Street”, not “Place”. To update the address, highlight the “12” row in the grid and click **Update**. The Address Validation screen appears



The Address Validation dialog box displays the following information:

Current Address Information

Constituent ID:
 Address Type: Home
 Address: 12 Arthur Place

Suburb: ADELAIDE
 State: SA Postcode: DPID

Choose the 'Update Address' button to update the current address information shown above with the validated address displayed below.

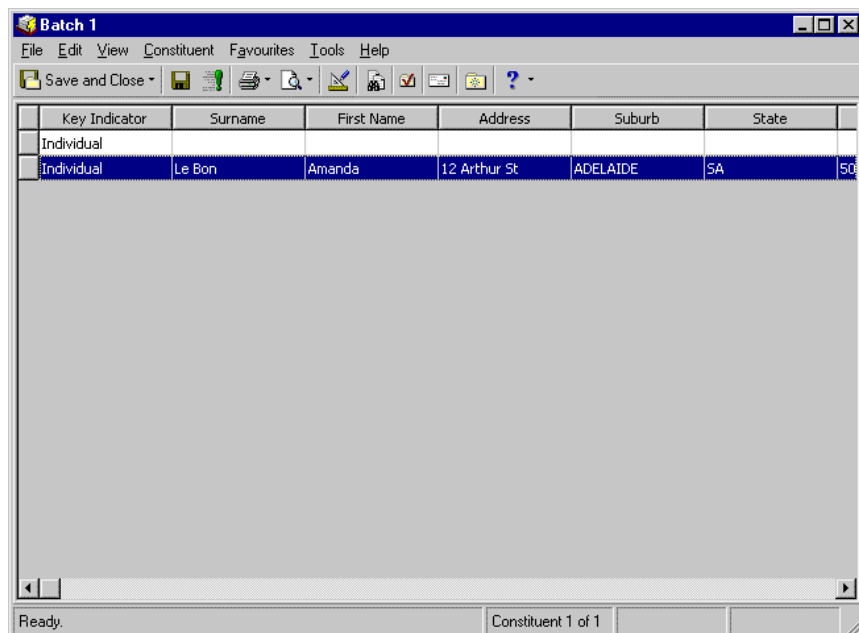
Address: 12 Arthur St Add footnote as an address attribute

Suburb: Adelaide

State: SA South Australia Date To Use: Today's date

Postcode: 5000 DPID: 49699169 Comment:

14. To update the address in *Batch*, click **Update Address**. The corrected and certified address appears in the batch.



The Batch 1 window displays the following grid:

Key Indicator	Surname	First Name	Address	Suburb	State	
Individual						
Individual	Le Bon	Amanda	12 Arthur St	ADELAIDE	SA	50


Ready. Constituent 1 of 1

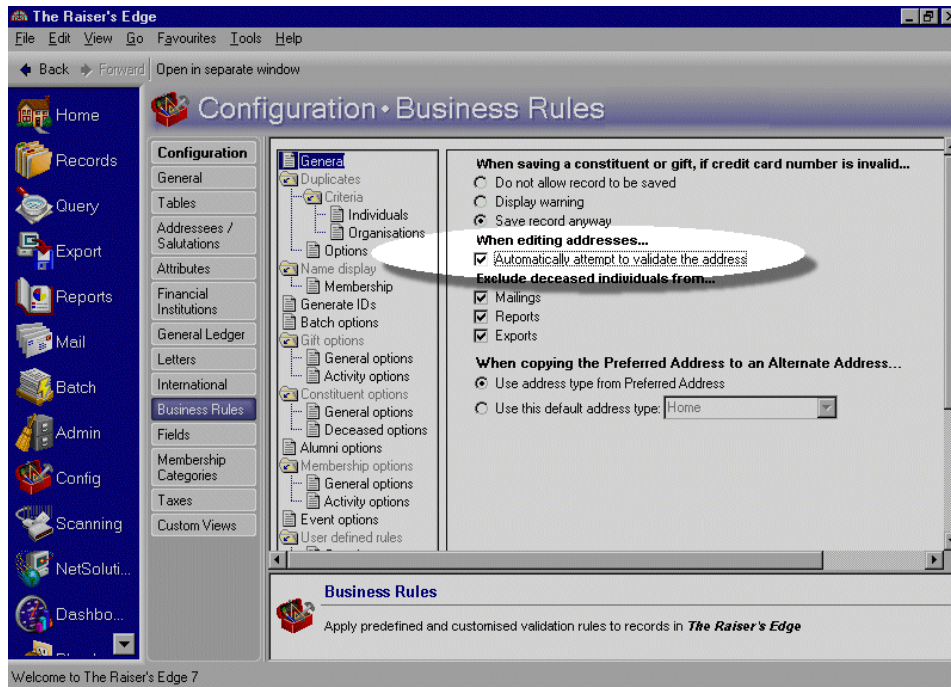
15. Continue with data entry. To save the information and close the batch, click **Save and Close**.

Establishing a Business Rule to Automatically Update Addresses

On the Business Rules page of *Configuration*, under **General**, the **Automatically attempt to validate the address** checkbox appears if you have *Address Validation*. Tick the **Automatically attempt to validate the address** checkbox if you want to see if an address meets *Address Validation* standards whenever you edit an address.

If you tick this checkbox, each time you leave a **Postcode** field or save a record where you have added or changed an address, *Address Validation* automatically runs. The correct and certified address fields automatically fill in.

 If you do not want to set the business rule to auto-validate each time you edit an address, you can still press **F8** on your keyboard or click the **Address Validation** button on the toolbar of a constituent, relationship, participant, or address record to run *Address Validation*.



Only addresses in countries for which you have ticked the **Addresses with this country are available for address validation** checkbox are included. For more information, see “Setting a Country’s Availability for Address Validation” on page 11.



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