



# Address Validation + Notification

keeping data clean, coded, and up-to-date





# Housekeeping

Ready to dive in? You'll need:

- MelissaData Account
- Account must include SmartMover Service







# Dual Focus

**NIGHTLY**  
Validation Focused

**MONTHLY**  
Notification Focused

Let's Get Technical: The same service is run both nightly and monthly, but the dataset is shifted.





# Closer Look: Nightly Validation



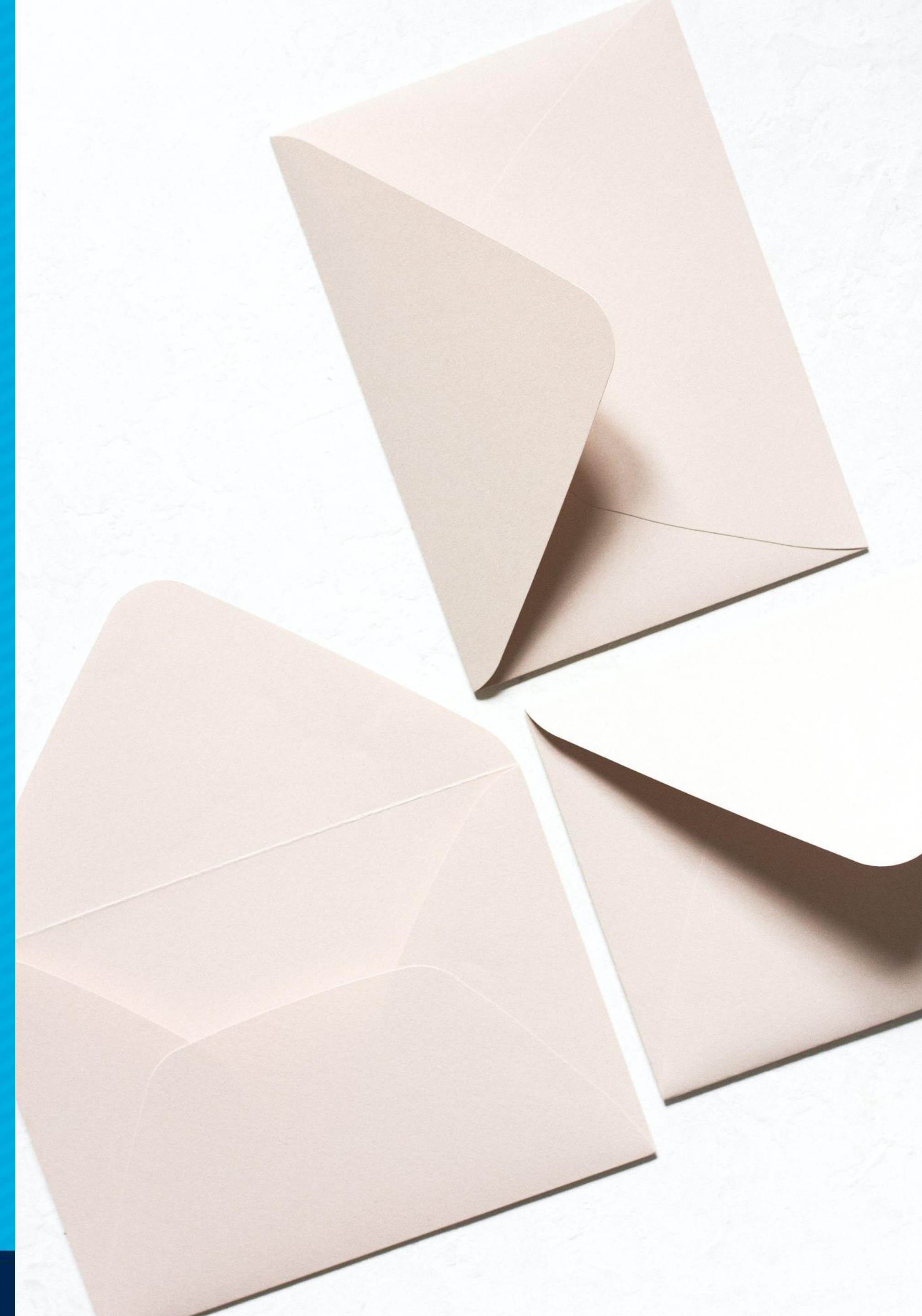




# Nightly Validation

## What is CASS?

- Coding Accuracy Support System
- Normalizes to USPS standards
- Boosts deliverability







# Nightly Validation - Configuration

Domain #1  
● nextgen.ministryplatform.net

General

To enable, add Melissa License Key

Recaptcha Secret Key

Auth Code Enabled \*

☒ Yes ☐ No

Auth Code Text Template

Login Verification Code (Text)

Melissa License Key

Auth Code Email Template

Login Verification Code (Email)

Address Change Task User

Tasks

Files

Audit Log





Nightly only considers unvalidated  
Addresses meaning after the initial run,  
it focuses on new Addresses.







# Nightly Validation - Population

GENERAL	
<u>Address Line 1 *</u> 2400 Jefferson	<u>Address Line 2</u>
<u>City</u> Dallas	<u>State/Region</u> TX
<u>Postal Code</u> 92445	<u>Country Code</u>
<u>Carrier Route</u>	<u>Lot Number</u>
<u>Delivery Point Code</u>	<u>Delivery Point Check Digit</u>

<u>Last Validation Attempt</u>	<u>County</u>
<u>Validated</u> N/A	<u>Do Not Validate *</u> No

GENERAL	
<u>Address Line 1 *</u> 2400 Jefferson	<u>Address Line 2</u>
<u>City</u> Dallas	<u>State/Region</u> TX
<u>Postal Code</u> 92445--1545	<u>Country Code</u>
<u>Carrier Route</u> C002	<u>Lot Number</u>
<u>Delivery Point Code</u> 01	<u>Delivery Point Check Digit</u> 8

<u>Last Validation Attempt</u> 09/20/2022 01:00 AM PT	<u>County</u>
<u>Validated</u> Yes	<u>Do Not Validate *</u> No





# Nightly Validation - Normalization

To conform to USPS standards, values may also be normalized. For example:

- Road to Rd
- Boulevard to Blvd
- Leverage Postal Code to correct City





# Nightly Validation - Normalization

GENERAL	
<b>Address Line 1 *</b>	<b>Address Line 2</b>
2323 Wilshire Boulevard	
<b>City</b>	<b>State/Region</b>
Los Angeles	CA
<b>Postal Code</b>	<b>Country Code</b>
90403	
<b>Carrier Route</b>	<b>Lot Number</b>
<b>Delivery Point Code</b>	<b>Delivery Point Check Digit</b>

GENERAL	
<b>Address Line 1 *</b>	<b>Address Line 2</b>
2323 Wilshire Blvd	
<b>City</b>	<b>State/Region</b>
Santa Monica	CA
<b>Postal Code</b>	<b>Country Code</b>
90403-1030	
<b>Carrier Route</b>	<b>Lot Number</b>
C003	
<b>Delivery Point Code</b>	<b>Delivery Point Check Digit</b>
12	3

Postal Code of 90403 updates City from 'Los Angeles' to 'Santa Monica'.





# Nightly Validation

Sometimes, mistakes happen. Rest easy with a fix view.

<div> <div>+</div> <div> <input type="text"/> <div> <div>🔍</div> <div> <div>▼</div> <div>in:</div> <div>Fix: Address Validation Unsuccessful</div> <div>▼</div> </div> </div> <div> <div>🔍</div> <div>🔔</div> <div>🗃️</div> </div> </div> </div>					
		Last Validation Attempt	Address Line 1	State/Region	Do Not Validate
<input type="checkbox"/>	●	09/20/2022 01:38 PM PT	708 Val Sereno Dr	CA	Yes
<input type="checkbox"/>	●	09/20/2022 01:36 PM PT	708 Val Sereno Dr	CA	Yes
<input type="checkbox"/>	●	09/20/2022 11:58 AM PT	123 Macaraena Boulevard	WI	Yes
<input type="checkbox"/>	●	09/20/2022 11:58 AM PT	123 Elf Rd	DC	Yes





# Closer Look: Monthly Notification







# Monthly Notification - Configuration

Domain #1  
● nextgen.ministryplatform.net

General

Recaptcha Secret Key

Auth Code Enabled \*

☒ Yes ☐ No

Auth Code Text Template

Login Verification Code (Text)

Melissa License Key

Auth Code Email Template

Login Verification Code (Email)

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To enable, add Melissa License Key

And Address Change Task User

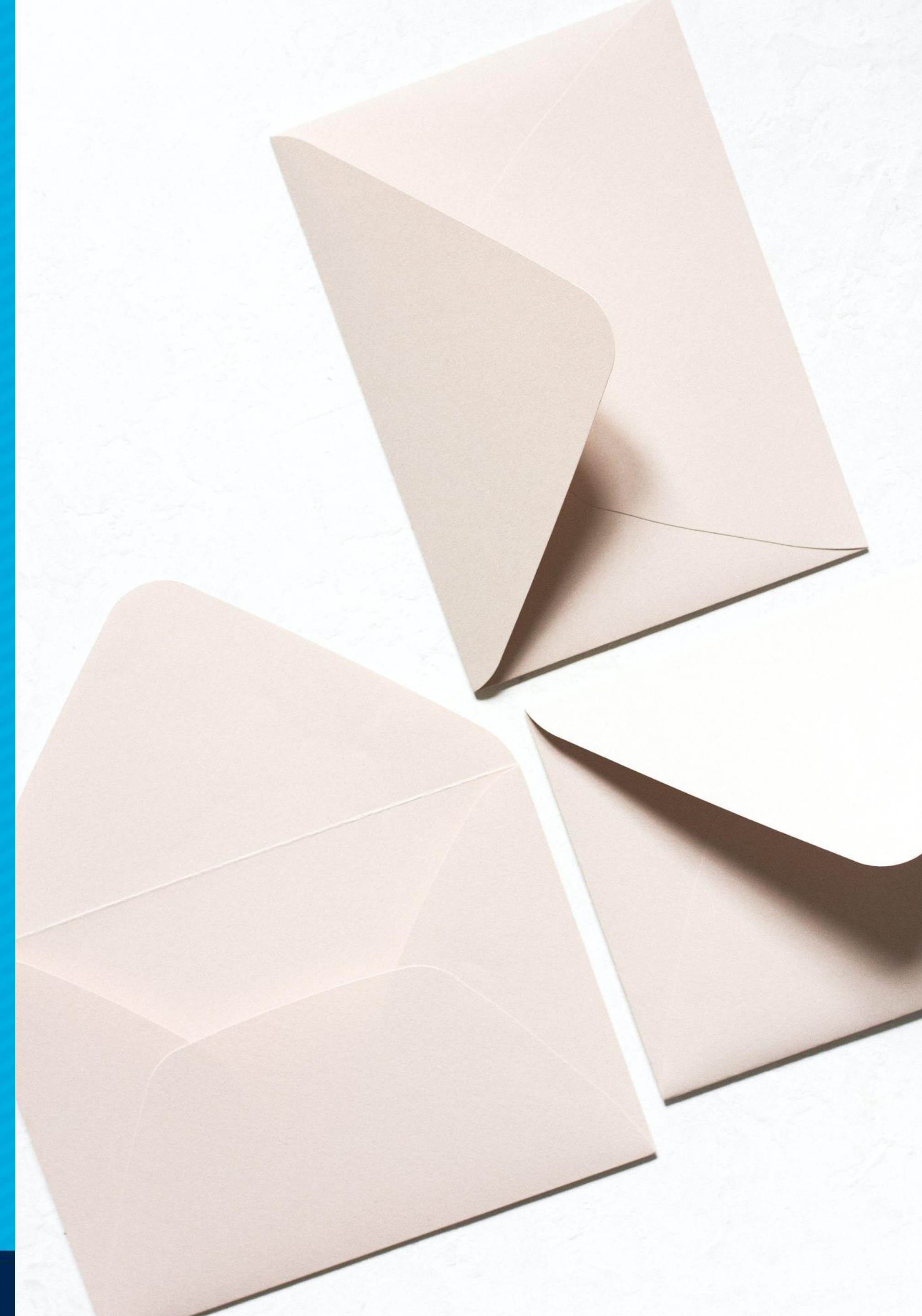




# Monthly Notification

## What is NCOA?

- National Change of Address
- Moves are filed with USPS
- Keeps Addresses up-to-date







# People move, Addresses don't

Monthly considers **all\*** Addresses  
because we don't know who moved  
until we check.

\*all requires association with a household







# Monthly Notification

## Move Type

Determined by USPS change-of-address form.

- Individual - Indicates a specific person has moved.
- Family - Indicates a family has moved. Includes members with matching last names.





# Monthly Notification

Task

Title: \*

NCOA Notice for Woods

Assigned To: \*

Ferragamo, Dallas - dallas@community.com

Start Date:

09/20/2022

Due Date:

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Savannah Woods moved on 07/2022 to 1300 Wilshire Blvd, San Diego, CA 27003-1413, United States (Individual).





Task

Title: \*NCOA Notice for Ferragamo

Assigned To: \*Bergdorf, Emma - emma@sample.com

Start Date: 09/20/2022Due Date:

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George Ferragamo moved on 08/2022 to 2424 Seabreeze Ln, Corona Del Mar, CA 26272-1001, United States (Family). Dallas Ferragamo moved on 08/2022 to 2424 Seabreeze Ln, Corona Del Mar, CA 26272-1001, United States (Family). Ella Ferragamo moved on 08/2022 to 2424 Seabreeze Ln, Corona Del Mar, CA 26272-1001, United States (Family).





# Monthly Notification

What to do with the Tasks?  
Tasks are intended for a staff member to review, interpret, and take action.







# Monthly Notification

Scenario: Only (1) Household Member is returned by NCOA.  
Might Indicate: Child ages out.

Possible actions might include creating a new Household, assigning person to new Household as a Head of Household, and creating a new Address.

The old Address would remain unchanged, associated with the original Household and its remaining Members.





# Monthly Notification

Scenario: Multiple new addresses returned by NCOA.  
Might Indicate: Heads of Household split.

Possible actions might include splitting the Household, creating new Addresses for each Household, updating marital status, updating Donor's statement type, and more.

Follow-up may be needed to accurately assign minor children or make additional changes. This may also be an opportunity for care!

Surprise! New 'Split Households' Tool coming very soon.





# Benefits

Have a big mailing coming up like holiday cards or giving statements?

CASS + NCOA work together to boost deliverability rates!







# Let's Get Technical

For those who want to know how it works, addresses returned by SmartMover go into one workflow or the other.

## Validation

Generally originates from nightly task; can only validate an unvalidated Address.

## Notification

Generally originates from monthly task; can notify on any Address.





# It's your data, pick the schedule that works for you!

If this feels like a good fit, get started with a Melissa Data account. This feature is flexible and can include only validation or, optionally, can also layer in change-of-address notifications.

See KB to revisit configuration details.

