Our Sunday Visitor Online List Manager

OLM Features

Online List Manager – Allows you the ability to look up parishioners, edit names and addresses, order starter sets and add new parishioners all under the **Online List Manger** icon

You can access the Online List Manager through the portal by going to **OSVOffertory.com.** Feel free to add this as a bookmark or favorite in your favorite browser. **Click the link in the upper right corner "Customer Account Login" to log in.**

Click on the purple Online List Manager button to access your parishioner list.



Once you have clicked on OLM, you will see the screen below

Our Sunday Visit	-	100000	70000500010					0 E	W	elcome, Portal User re: 555 Inactive: 0
st(s)	Search b	y Name, Env	#, & Address					Search	*	New Parishioner
ALL LISTS	Env #	Status	Last Name	First Name	Title	Address	City	50	66))	ZIPIPostal Code
ADULT WEEKLY	1	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	9N		46750
EASTER	2	Active	SMITH	JOHN	MRMRS	123 MAIN ST	HUNTINGTON	IN		46750
OLG	3	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN		46750
3167	4	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN		46750
	5	Active	SMITH	JOHN	MRMRS	123 MAIN ST	HUNTINGTON	IN		46750
tatus	6	Active	SMITH	JOHN	MRMRS	123 MAIN ST	HUNTINGTON	IN		46750
O Active	2	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	iN		46750
0	6	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN		46750
Inactive	9	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	iN		46750
O AL	10	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN		46750

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Filter Options

You may choose to view your parishioner information in a number of ways, using the filter options below:

- List if you have multiple lists, you may select to view only parishioners from particular lists or view all parishioners from all lists. The List(s) field will default to ALL lists if there are multiple lists. When there is one list, that list will be displayed.
- Status select to view all parishioners or only active or inactive parishioners
- Items per page this will allow you to view 10 records per page or change it to view 25 records per page

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JR SUND			0000500010				Par	ishioners		Welcome, Po tive: 555 Inc	
a) (*	Beard	h by Name, Envi	K & Address					Sear	ch 🔹	New P	arishioner
LISTS	Erry #	Status	Last Name	FintNane	Title	Address	City		State	IP-Posts (Code :
ILT WEEKLY	1		ATH	JOHN	MR-MRS	120 MAIN ST	HUNTINGTO	N)	IN	46750	
TER	12	Filter	ITH .	JOHN	MR-MRS	123 MAIN ST	HUNTINGTO	N	iN	46750	
	1 3	by	ATH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTO	N.	IN	46750	
	4	Status	ATTH .	JOHN	MR-MRS	123 MAIN ST	HUNTINGTO	N.	IN	46750	
	/ 5	Status	ATH	JOHN	MRMRS	123 MAIN ST	HUNTINGTO	N	IN .	46750	
5	6	Active	SMITH	JOHN	MRMRS	123 MAIN ST	HENTINGTO	N	IN	46750	
Active	2	Active	SMITH	JOHN	MR-MRS	171 Ite	ms per	nage		46750	
	6	Active	SMITH	JOHN	MR-MRS	123 1				46750	
ictive.	9	Active	SMITH	JOHN	MR-MRS	23 MAIN ST	HUNTINGTO	N.	IN	46750	
Al	10	Active	SMITH	JOHN	MRARS	120 MAIN ST	HUNTINGTO	N	IN	46750	

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Sorting Options

You may sort any of the following Ascending or Descending by clicking on the text:

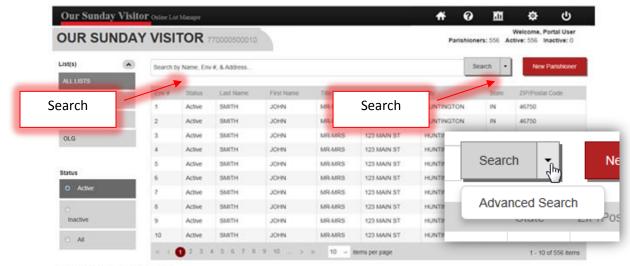
- Env #
- Status
- Last Name
- First Name
- Title
- Address
- City
- State
- Zip/Postal Code

Our Sunday Visit	tor Online List	t Manager					A (0	ii.	Φ	Ċ
OUR SUNDA	Y VISI	TOR	70000500010				Parish	ioners: 55		Welcome, Por tive: 555 lina	rtal User Ictive: 0
List(5)	Search b	y Name, Env	e #, & Address					Search		New P	arishioner
ALL LISTS	Env #	Status	Last Name	FistNase	Tille	Address	City	5	200	IP/Fostal C	1001
ADULT WEEKLY		Active	SMITH	30449	MRMRS	123 MAIN ST	HUNTINGTON		-	45750	
EASTER	2	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	15		46750	
OLG	3	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	31		46750	
2.67	4	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN		46710	
	5	Active	SMTH	JOHN	MRMRS	123 MAIN ST	HUNTINGTON	0		.45750	
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0	4	Active	SMITH	JOHN	MR-MRS	123 MAIN 5T	HUNTINGTON	15		46750	
Inactive	9	Active	SMTH	JOHN	MR-MRS	120 MAIN ST	HUNTINGTON	in in		46750	
0 AL	10	Active	SMTH	JOHN	MRAIRS	123 MAIN ST	HUNTINGTON	IN		46750	

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Search Options:

Search – Allows you to search the various fields in a parishioner record. Enter your search criteria and hit the enter key or click the Search button



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Advanced Search – Allows you to do a specific search using several options including envelope #. Click on the arrow to the right of the Search button to access the Advanced Search. In the Advanced Search box enter your search criteria and click the Search button.

Advanced Search	×
Envelope Number	
First Name	Last Name
Address 1	
City	Postal/ZIP Code
	Search

parishione	blank er record	Our Sunday Vi							1 6		CP Welcome, Porta
will open.		List(s)			v #, & Address				Pansh	Search +	New Para
		ALL LISTS	Enva	Shahes	Last Name	First Name	Tax	Address	Chr	State	28VPostar Cod
		ADULT WEEKLY	1	Active	SANTH	JOHN	MRMRS	123 MAIN ST	HUNTINGTON	IN	46750
		EASTER	2	Active	SMITH	JOHN	MR.MRS	123 MAIN ST	HUNTINGTON	IN	46750
		OLG	3	Active	SMTH SMTH	JOHN	MR.MRS MR.MRS	123 MAIN ST 123 MAIN ST	HUNTINGTON	IN IN	46750 46750
UR SUNDAY	Outre Los Manager	20010					4	¥ Ø	Created 2 45 20 PM 1		Dortal Use Modified 2:45:20 Pt
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UR SUNDAY	Celaul Name (Manage Parely N	aner) Fest Name	Curl N	~		D Erwi	ige Turbe	620/2014	Created: 2 45 20 PM	velcome, 1/20/2014	Portal Use Modified
UR SUNDAY	Column Name (Manage Family N	aner) Fest Name	Last N	~		_	ige Norde	620/2014	Created: 2.45.20 PM	Velcome, 1/20/2014	Portal Use Modified
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UR SUNDAY	VISITOR 7700000	aner) Fest Name	Last N			Corr	ige Nutile a(1	620/2014	Created: 2.45.20 PM	/elcome, 525/2014 7# 19/5cner?	Portal Use Modified 2.45/20 Pt
UR SUNDAY	VISITOR 7700000	Fest Name	Last No.	114			uge filotolle ak 1	620/2014	Created: 2.45.20 PM	/elcome, 525/2014 7# 19/5cner?	Portal Use Modified 2.45/20 Pt
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- Fill in all required name and address fields and tab through the fields. The City and State will populate after entering the ZIP.
- If you assign envelope numbers, you will need to enter the number in the Envelope Number box. If you want to use the next available envelope number, you will need to press the Next Env. # button.
- Optional fields are available to record the contact phone number, email, fax number and notes.

Adding a new parishioner continued

- If there are multiple mailing lists, check the box for the appropriate list.
- When Starter Sets are an option on a particular list, the box will appear after selecting the list.

-			EASTER	tarter Set?		
	Our Sunday vis	AY VISITOR 7700	OLG		Creat	Welcome, Portal Us Welcome, Portal Us act: Modifie PM 8/20/2014 2:45/20 P
		Ten	Feet Name		etige Number	ent Env #
	Actions Viter History	Primary Address Attem	ate Address	Star	ter Set	nshaner? te
st.		Address 2 City 20 th /thetal Code				
					Save/Love Save/Cove	Cancel
	Copyright © Our Sunday Ve	ator the 2014				

- When you are completely done adding your parishioner, click the Save/Close button. This action will activate Auto – Correct, which will validate the address.
- If you have more than one parishioner to add click the Save/New button. Auto – Correct will be activated to validate the address. The record will be saved and a new record will be opened for the next parishioner

Auto-Correct

The Auto-Correct feature provides immediate CASS[™] validation on addresses as you make entries.

• An address validation message will appear when you add a new parishioner or change an address on an existing record.

	Primary Address has been Standardized The Primary Address you entered has been Standardized to meet USPS requirements.								
Standard	ized Address:	Submitte	d Address:						
Address 1:	200 NOLL PLZ	Address 1:	200 NOLL PLAZA						
Address 2:		Address 2:							
City:	HUNTINGTON	City:	HUNTINGTON						
Zip/Postal:	46750 - 4310	Zip/Postal:	46750 -						
			ОК						

Changing/Deleting/Deactivate/Reactivating a Parishioner Record

Use the **Search** or **Advanced Search** to locate the parishioner that you wish to change or delete. Click on the record of the parishioner that you wish to change or delete. This will open the family details screen so a change can be made.

Changes- You may change:

- · Any of the name or address fields
- Move or add the parishioner to another list (if there are multiple lists).
- To change an envelope number, it is recommended that you delete the record and add a new record with that envelope number. This disconnects the previous parishioner from the record so it is available for a new parishioner.
- · Send a starter set
- Update contact information
- Click Save/Close to save the changes.

Deletions

- Click on the **Delete** button
- You will be asked if you are sure you want to delete this record, click Delete or Cancel
- Deletions are immediate and permanent. A new record will need to be created to restore the parishioner information in the event that the record should not have been deleted

Changing/Deleting/Deactivate/Reactivating a Parishioner Record continued

Deactivate/Reactivate

- To deactivate, click the Inactive Parishioner box under Status. This will stop the parishioner from receiving envelopes but does not delete them
- To set a date for the parishioner to be reactivated, click on the calendar in the **Reactivate Date** field under Status. Select the month/year that the parishioner should resume receiving the envelope mailing.

						ive Paris ate Date:		
					06/201	5	1	
					<	20)15	>
					Jan	Feb	Mar	Apr
					Мау	Jun	Jul	Aug
Our Sunday Visito	Y VISITOR ##000000010	Ħ	Creat	Welcome,	Sep	Oct	Nov	Dec
ACALT WEEKLY EASTER	Coluit Name (Manape Family Same)	Environ Number	20/2014 2 45 20	ent Env #	Mor	iday, Aug	gust 25, :	2014
OLG Sens AGR HISTORY	Pomary Address Attenuate Address	Contact Phone	Status El Inactiv	tve Parshoner? ate Date		nact Read		
	Adores 1 Adores 2 Adores 2 Gry State State Dhilves Color	Email Fan Itoles						
		Savoliev	Save Cose	Cancel				

Alternate Addresses

Maintain an alternate address for your parishioners and set begin and end dates for the envelopes to be sent to this address

OUR SUNDA	Y VISITOR		820/20	Welcome, Portal Use Created: Modified: 114.2.45:20 PM 8/20/2014.2.45:20 PM
ADULT WEEKLY	Orlaut Nane (Marape Fandy Nanes) Tels Fest Nane Primary A32ress Alternate A32ress	Lat York	Environ Bunter Contact	Status
VERIVETORY	Address 1 Address 2 City City DPPFortix Code	Ster	Prove Ereal Fee Roles	Reactivate Date
	-		Savetiew Sav	e Cose Carcel

- Click on the Alternate Address tab.
- Fill in all required address fields.
- City and State will populate after filling in the zip.
- Select Begin Month/Year and End Month/Year for envelopes (optional).
- Click Save/Close

Primary Address	Alternate Address			
Address 1		Begin Date	End Date	
Address 2				
City		State		•
ZIP\Postal Code	-			
Remove Altern	ate Address			

Managing Family Names

This feature allows you to maintain different names for a parishioner record when the record exists on more than one list. Refer to the Manage Family Names document under HELP in the Online List Manager for additional information.

Our Sunday Visito	P Oxford in Manager	_	-	e Family nes	ත් දූ ර
	VISITOR 770000500010				Welcome, Portal User Created: Modified: 014 2.45 20 PM 6/20/2014 2.45 20 PM
List(s)	The SMITH Family Details				
ADULT WEEKLY Send Starter Set?	Oefault Name (Manage Family Names)			1	
EASTER	MR-MRS JOHN Title First Name		SMITH ast Name	1 Envelope Number	Next Env #
tions	Primary Address Alternate Address			Contact	Status
IEW HISTORY	123 MAIN ST			Phone	Reactivate Date:
RINT	Address 1			Email	
	Address 2				
	HUNTINGTON City	IN State		Fax Notes	
	46750 ZIPPostal Code				
				Update Save/	Close Cancel Delete
Copyright © Our Sunday Visitor	Inc. 2014				

Contacts and Notes

Maintain the parishioner's phone number, email and fax number. The Notes field is a place where you can record information on the parishioner record.

SUNDAT	VISITOR 7700000 Con	itact		Created:		
			8/20	2014 2:45:20 PM 8	Contact	Status
۲	The SMITH Family Details					Inactive Parishioner?
FWEEKLY ind Starter Set?	Oefault Name (Manage Family Names)		1		Phone	Reactivate Date:
t in the second s	MR-MRS JOHN	SMITH	1	Next En		
	Title First Name	Last Name	Envelope Number		Email	
	Primary Address Alternate Address	Notes 📗	Contact	Status		
STORY	123 MAIN ST		Phone	Reactivate Dat	Fax	
	Address 1				Fax	
			Email		Notes	
	Address 2					
	HUNTINGTON	IN 💌	ax.			
	City	State	Notes			
	46750					
	ZIP:Postal Code					
			Update Save	Close Cano	Update Sa	ve/Close Cancel Dele

Actions and View History

To access the history of transactions on a record click **View History**. The History screen displays changes in red text, the date of the change and the user that modified the record.

Click **Print** to print a copy of the parishioner record.

	Our Sunday Visitor	VISITOR 770000500010	☆ ☆ ☆ weil weilcome, Portal U Weicome, Portal U Created: Modifi
/iew History	List(s)	The SMITH Family Details	8202014 2 45 20 PM 8202014 2 45 20
	EASTER	MR-MRS JOHN SMITH Title First Name Last Name	1 Next Env #
Print	Actions	Primary Address Alternate Address	Contact Status Inactive Parishioner? Phone Reactivate Date:
		Address 1	Email
		Address 2 HUNTINGTON City State	Fax Notes
		46750 - ZIP/Postal Code	
			Update Save/Close Cancel Delete

How to Print Reports from Online List Manager

To access the Report feature, click on Reports in the tool bar along the top of the Online List Manager. You can select any of the report options below. Each report has additional filter options.

Reports

- Parishioner List
- Deleted Family
- Adds & Changes
- Address Corrections
- Labels

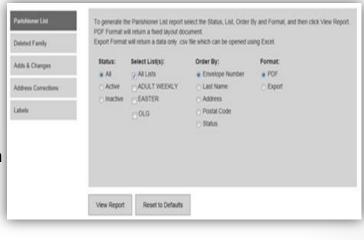
Our Sund			111212-042	70000500010				A O	100 ers: 555	Welcome, P Active: 555 Is			
st(s) ALLUSTS	۲	Search b	y Name, Em	R, & Address				5	earch .	New	Parishioner		_
		Env#	Status	Last Name	First Name	Title	Address	Chy		fi -	•	.11	ø
ADULT WEEKLY	ţ.	1	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	<u> </u>		•		
EASTER		2	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON				Reports	
OLG		3	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON				(**)	
		4	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN	46750			
		5	Active	SMITH	JOHN	MRMRS	123 MAIN ST	HUNTINGTON	IN	46750			
tatus	-	6	Active	SMITH	JOHN	MRMRS	123 MAIN ST	HUNTINGTON	IN	46750			
O Active		7	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN	46750			
		8	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN	46750			
inactive		9	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN	46750			
O AR		10	Active	SMITH	JOHN	MR-MRS	123 MAIN ST	HUNTINGTON	IN	46750			

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How to Print a List of Parishioners

OUR SUN	DAY VIS	ITOR 77000	0500010					
Parishioner List Deleted Family	PDF Format w	Ill return a fixed layout doc	elect the Status, List, Order ument. file which can be opened u		hen click View	Report.		
Adds & Changes	Status:	Select List(s):	Order By:	Format:				
Address Corrections	Al Al Active	All Lists	Envelope Number Last Name	PDF Export				
Labels	Inactive		Address Postal Code Status					
	View Report	Reset to Defaults	1					

- Select Parishioner List
- Select the Status. This is defaulted to ALL, or select Active or Inactive.
- Select the appropriate List. This is defaulted to ALL, or if there are multiple lists you can select a single list or multiple lists.
- Select Order By
- Select the Format
 - PDF will return a fixed layout document which can be printed
 - Export will return a data only .csv file which can be opened using Excel
- Click view Report



How to Print a List of Deleted Families

- Select Deleted Family
- Select the appropriate **List**. This is defaulted to ALL. If there are multiple lists you can select a single list or multiple lists.
- Select the Start Date and End Date
- Select the Order By
- Select the Format
 - PDF will return a fixed layout document which can be printed
 - Export will return a data only .csv file which can be opened using Excel
- Click View Report

Deleted Family	PDF Format will return a Export Format will return	and the second se		opened using Excel.	
4dds & Changes	Select List(s):	Start Date:	i.	Order By:	Format:
	Z Al Lists	1/1/2014	64	Envelope Number	. PDF
Address Corrections	ADULT WEEKLY	End Date:		 Last Name Address 	 Export
abels	EASTER	6/30/2014	122	Postal Code	
	Dore			Transaction Date	

How to Print a List of Adds and Changes

- Select Adds & Changes
- Select the appropriate **List**. This is defaulted to ALL. If there are multiple lists you can select a single list or multiple lists.
- Select the Start Date and End Date
- Select the Order By
- Select the Format
 - PDF will return a fixed layout document which can be printed
 - Export will return a data only .csv file which can be opened using Excel
- Click View Report

Deleted Family		ill return a fixed layout doci will return a data only .csv		ened usi	ng Excel.	
Adds & Changes	Status:	Select List(s):	Start Date:		Order By:	Format:
Charles and Charle	a Al	2 Al LISS	1/1/2014		Envelope Number	e POF
Address Corrections	 Active 	ADULT WEEKLY	End Date:		C Last Name	C Export
Labols	() Inactive	OLO	1/31/2014	1	Address Postal Code Status Transaction Date	
	View Report	Reset to Defaults	ĺ			

How to Print a List of Address Corrections

- Select Address Corrections
- Select the appropriate **List**. This is defaulted to ALL. If there are multiple lists you can select a single list or multiple lists.
- Select the Start Date and End Date
- Select the Order By
- Select the Format
 - PDF will return a fixed layout document which can be printed
 - Export will return a data only .csv file which can be opened using Excel
- Click View Report

Deleted Family	PDF Format will return a Export Format will return			be opened using Excel.	
idds & Changes	Select List(s):	Start Date:		Order By:	Format:
	Al Lats	1/1/2014	В	Envelope Number	• PDF
Address Corrections	- ADULT WEEKLY EASTER	End Date:		 Change Date 	⊖ Export
Labels	Dore	1/31/2014	Ħ	() List	

How to Print Labels

- Select Labels
- Select the Label Type
- Select the **Status**. This is defaulted to ALL, or select Active or Inactive.
- Select the appropriate List. This is defaulted to ALL. If there are multiple lists you can select a single list or multiple lists.
- Hide Envelope Number, is optional
- Select the Order By
- The Format is preset to PDF for labels
- Click View Report

Parishioner List Deloted Family	Number box is optio			rt and End Dates, Order By	and Format, and then click V	iew Report. The Hide Envel
Adds & Changes Address Corrections	Label Type: • Avery 5160 • Avery 5161 • Avery 5162 • Avery 5261 • Avery 5262	Status: All Active Inactive	Select List(s): VALUAS AQULT WEEKLY EASTER OLG	Hide Envelope Number?	Order By: Envelope Number Last Name Address Postal Code	Format: POF
	View Report	Reset to Defaults				

PDF Format

Upon clicking View Report, for the PDF format, the print preview will open using Adobe Reader. Depending on your settings in Adobe Reader, you may find the print icon in the upper left side of the window.

If you do not see the print icon in the upper left side, the Adobe Reader tool bar may be hidden when you first open the report. You will need to hover your mouse over the top or bottom center of the screen. A mini tool bar will appear, allowing you to click on the print icon. (*See figure A on the next page*)

After clicking print, your printer options will appear. The Page Sizing should be set to "Actual" size.

I 🕄 🔁	8	1	/1 938%		8 🖪 🖃			Tools Sign C	Commen
C	Filters applied				nge Report				I
Print	Selected Date R Record Status: Sort Criteria:	ange: 8/26/3 All	1014 to 8/26/2014 11:59:59 er	PM					
								Printed:8/26/2014	
	List: ADULT WED	Transaction Do	in Norme	Address	Address 2	City, State Zip	Status	Modified By	
	Changed 1	8/25/2014	MRARS JOHN SMTH JR	200 NOLL PLZ	A009418 2	HUNTINGTON, IN 48750 - 4310	Active	OSV Customer Service	
	Changed 2	8/25/2014	MR JOHN SMITH	200 NOLL PLZ		HUNTINGTON, IN 46750 - 4310	Active	OSV Customer Service	
				1 0	of 1				

Figure A.

				Add/Chan	ge Report			
Selected	applied: — d Date Ra Status: / iteria: [2014 to 8/26/2014 11:59:59 F	РМ				
								Printed:8/26/20
LINE ADU	AT WEDRLY							
Action	Env #	Transaction Dat	te Name	Address	Address 2	City, State Zip	Status	Modified By
Changed	1	8/26/2014	MR-MRS JOHN SMITH JR	200 NOLL PLZ		HUNTINGTON, IN 46750 - 4310	Active	OSV Customer Service
Changed	2	8/25/2014	MR JOHN SMITH	200 NOLL PLZ		HUNTINGTON, IN 46750 - 4310	Active	OSV Customer Service
			Print					
		_						
				B ⊕ ↑ ₹ 0		<u>لم</u>		

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