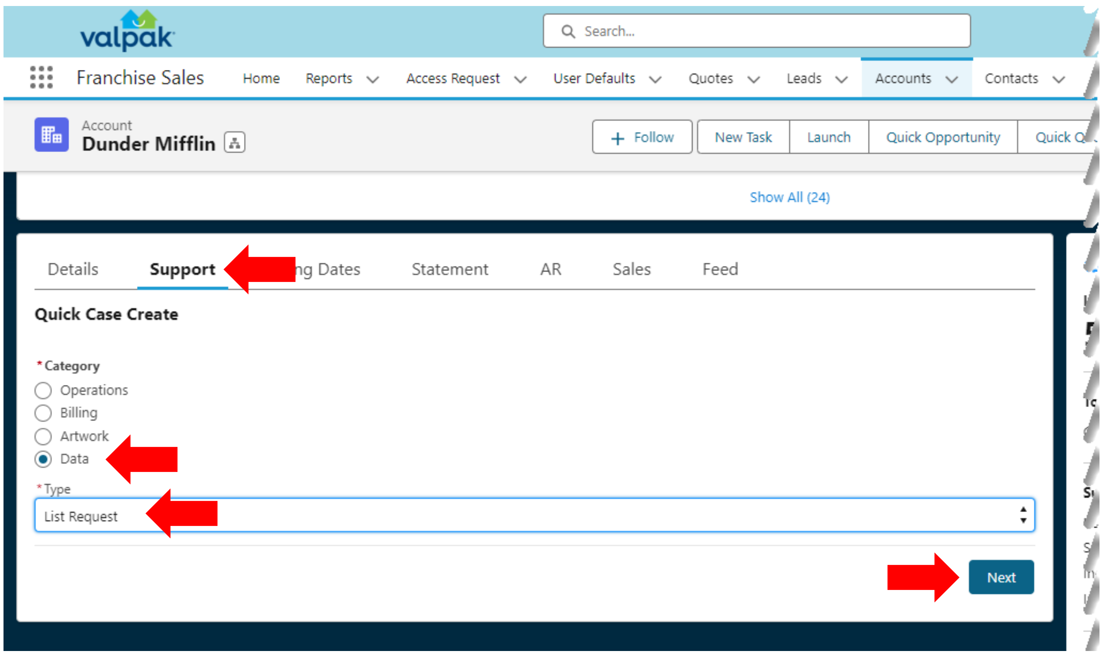
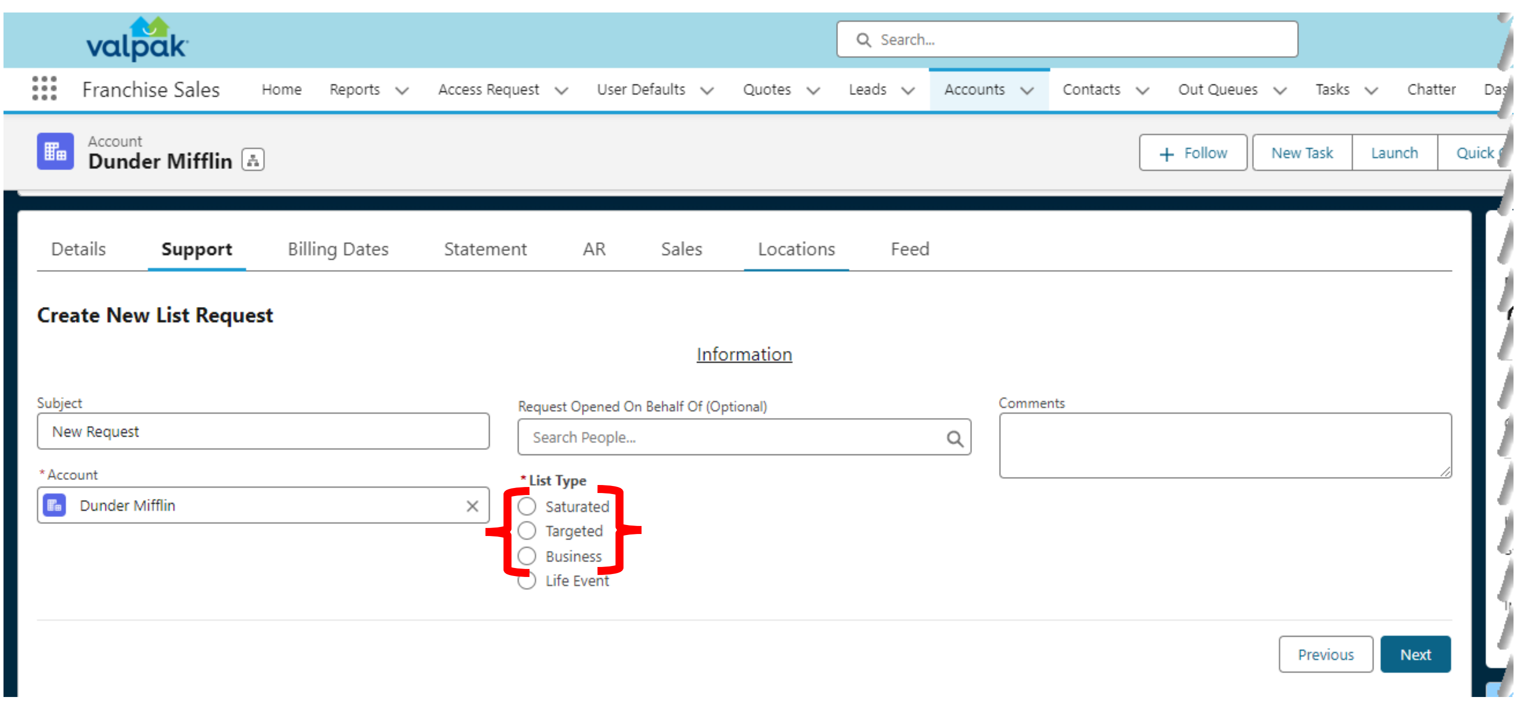
# Standard SOLO

## Creating a Standard SOLO List Request:

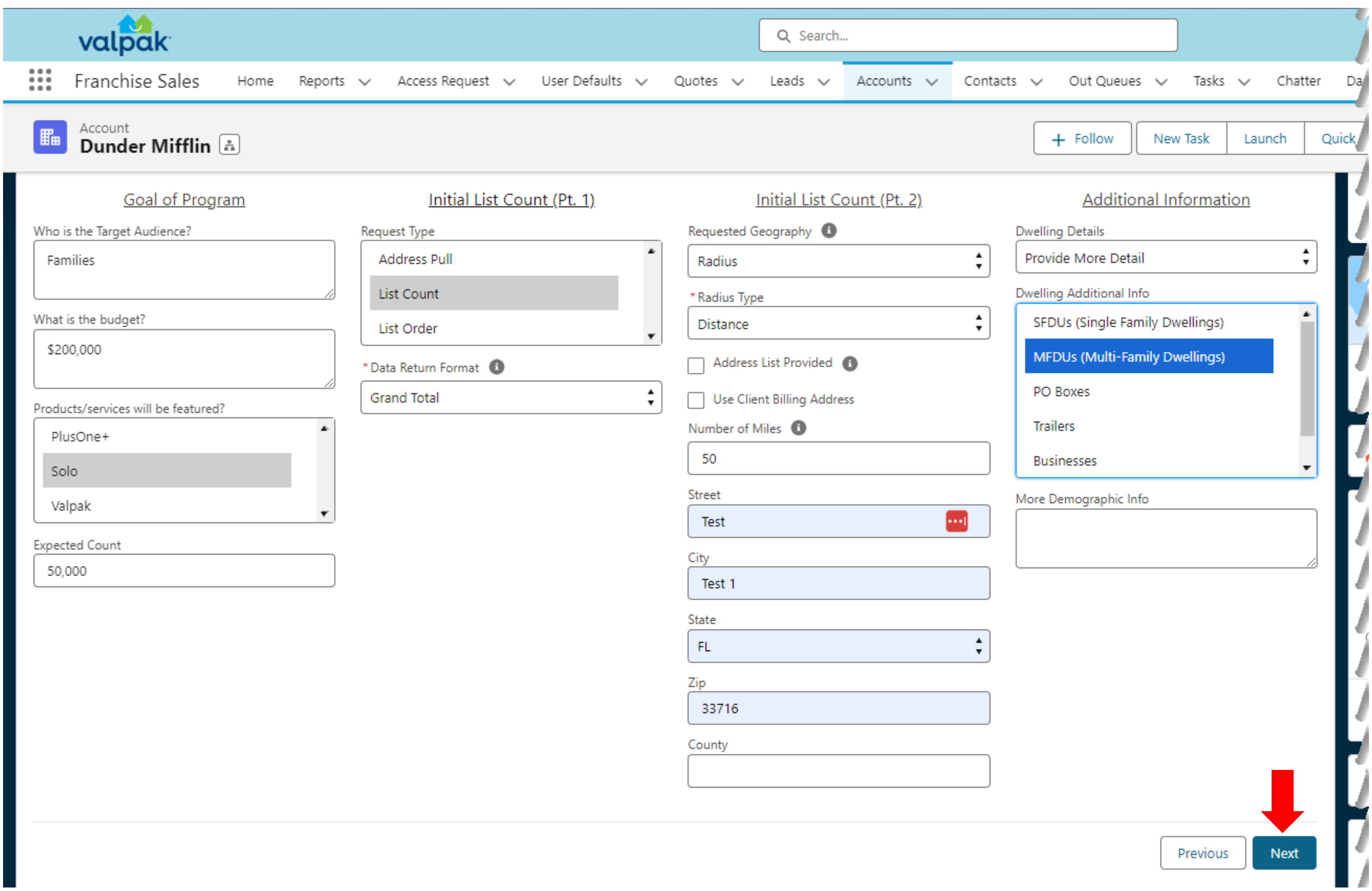
1. On the Account Record, click on Support.
2. Under Quick Case Create, choose Data as the Category, List Request as the Type, and click Next.



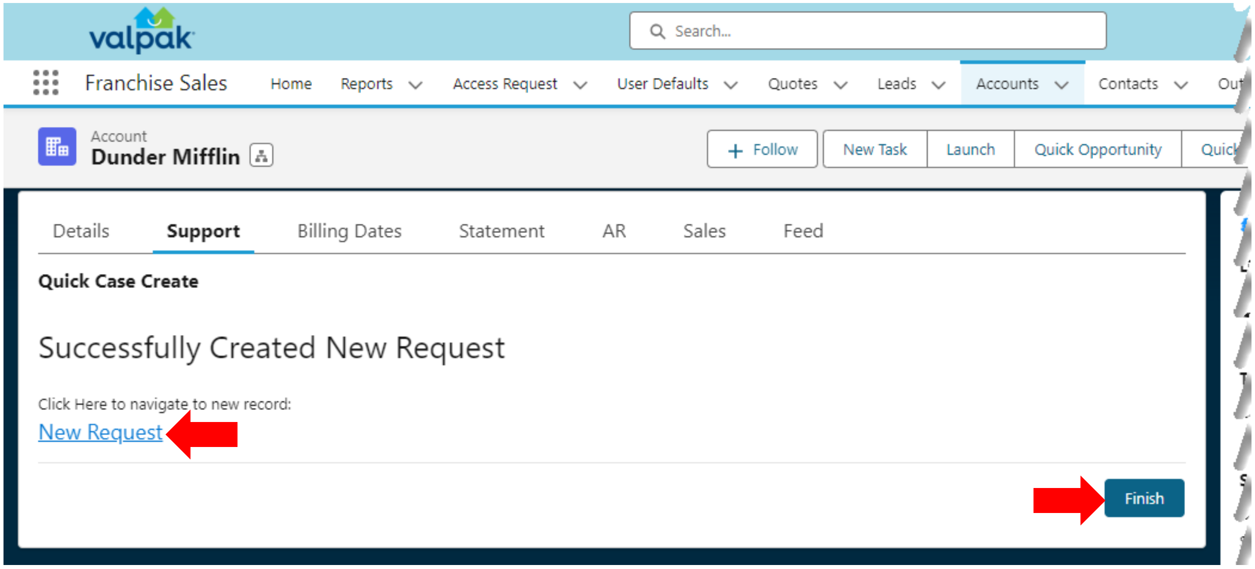

3. Choose Saturated, Targeted, or Business as the List Type under *Information*.
   a. It's best practice to fill in as many fields as possible.



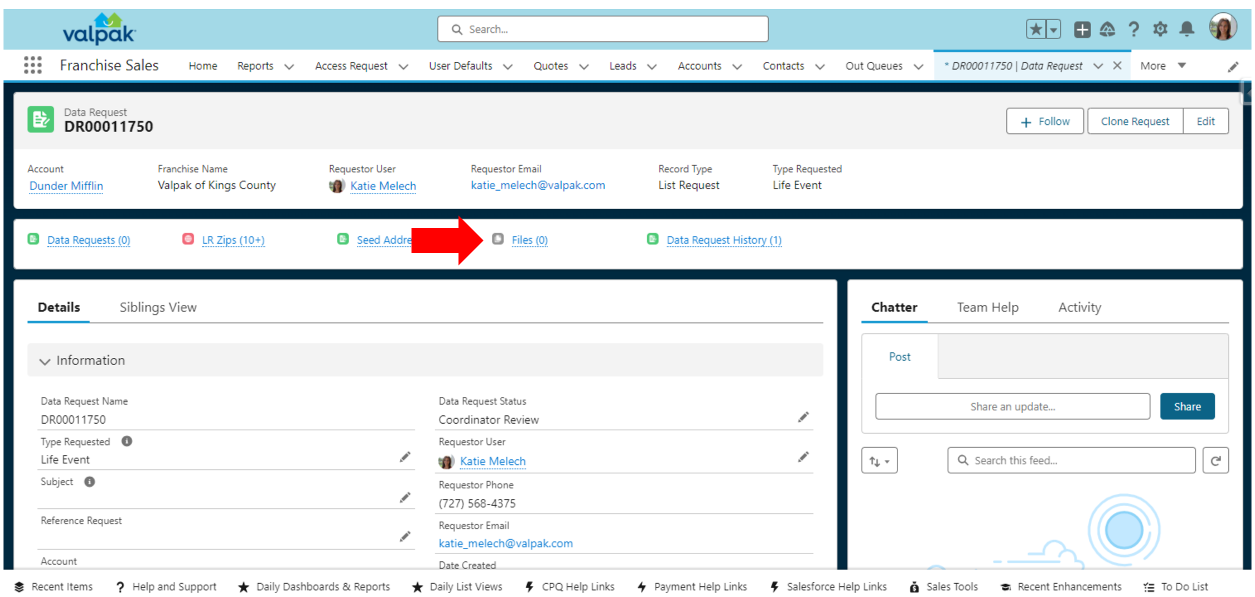
4. Fill in all as many fields as possible to help your Data Request team member pull in the best data for you.
    a. ***Who is the Target Audience?*** – who are you looking to mail to. Families, Residential, Apartments, etc.
    b. ***What is the budget?*** – provide a $ amount if possible.
    c. ***Products/services will be featured?*** – SOLO will most likely be the option you pick here.
    d. ***Expected Count*** – how many addresses are you wanting to mail.
    e. ***Request Type*** – Select one of the 3 options.
        i. Note: Selecting "List Count" will show an additional required field, "Data Return Format."
    f. ***Request Geography*** – Select one of the 6 options.
        i. Note: Selecting "Radius" will show additional required fields. Depending on the Radius Type selected will determine which additional information may be needed.
    g. ***Dwelling Details*** – Select one of the 4 options.
        i. Note: Selecting "Provide More Detail" will show additional optional fields.
5. Click Next.



6. You can click on New Request to View the request you just created or click Finish to return to start of Data Request form.

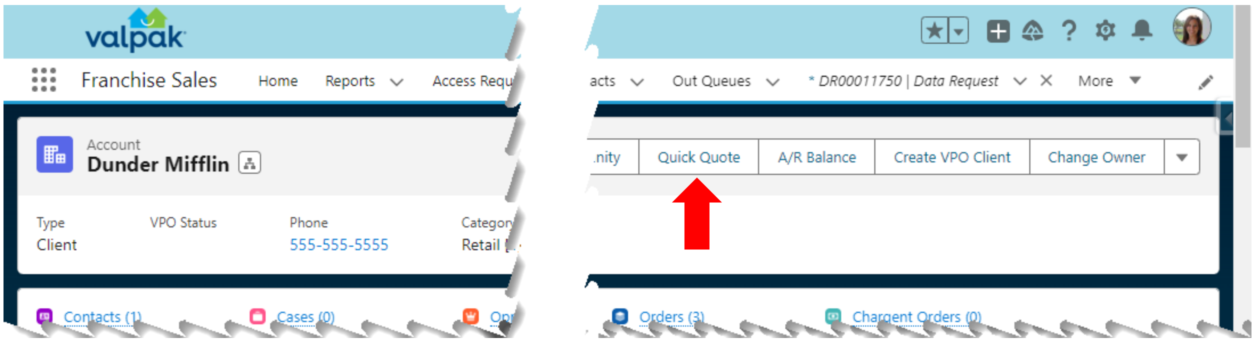



7. If you checked Address List Provided, you will need to upload the Address File to the Request record under Files.

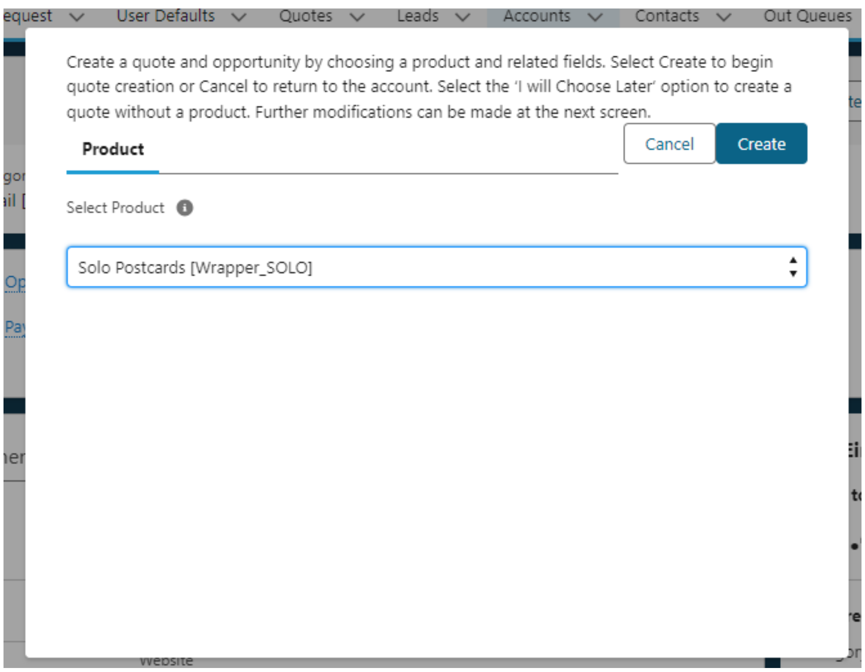


# Create a Standard SOLO Quote:

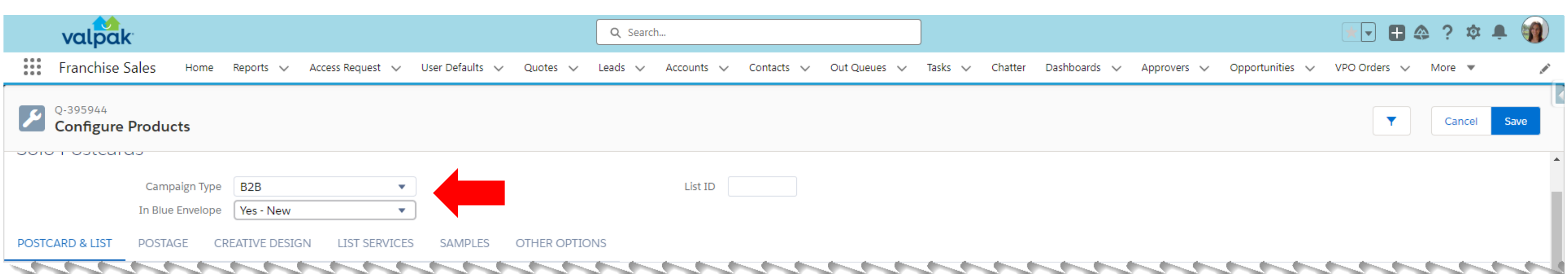
1. On the Account record, click *Quick Quote*.



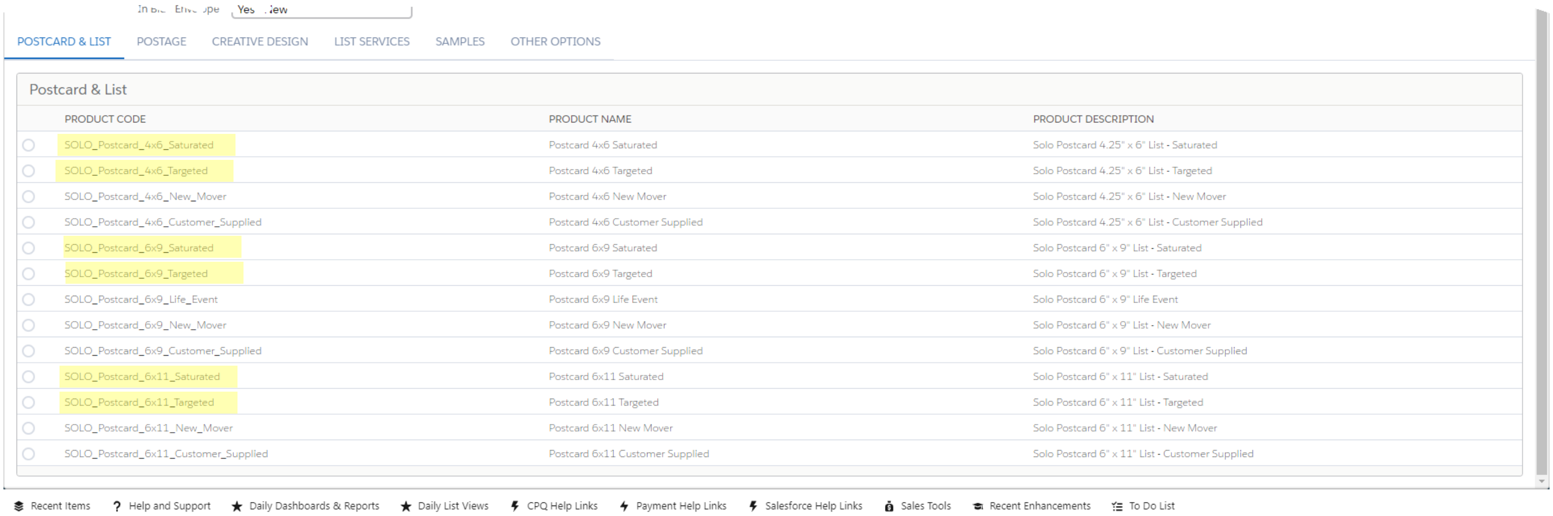

2. Select *Solo Postcards [Wrapper_SOLO]* and then click *Create*.




3. Select a *Campaign Type & In Blue Envelope*.



4. *Postcard & List:* Select 1 of the 6 Standard SOLO options.



POSTCARD & LIST | POSTAGE | CREATIVE DESIGN | LIST SERVICES | SAMPLES | OTHER OPTIONS

Postcard & List

| PRODUCT CODE | PRODUCT NAME | PRODUCT DESCRIPTION |
|---|---|---|
| SOLO_Postcard_4x6_Saturated | Postcard 4x6 Saturated | Solo Postcard 4.25" x 6" List - Saturated |
| SOLO_Postcard_4x6_Targeted | Postcard 4x6 Targeted | Solo Postcard 4.25" x 6" List - Targeted |
| SOLO_Postcard_4x6_New_Mover | Postcard 4x6 New Mover | Solo Postcard 4.25" x 6" List - New Mover |
| SOLO_Postcard_4x6_Customer_Supplied | Postcard 4x6 Customer Supplied | Solo Postcard 4.25" x 6" List - Customer Supplied |
| SOLO_Postcard_6x9_Saturated | Postcard 6x9 Saturated | Solo Postcard 6" x 9" List - Saturated |
| SOLO_Postcard_6x9_Targeted | Postcard 6x9 Targeted | Solo Postcard 6" x 9" List - Targeted |
| SOLO_Postcard_6x9_Life_Event | Postcard 6x9 Life Event | Solo Postcard 6" x 9" Life Event |
| SOLO_Postcard_6x9_New_Mover | Postcard 6x9 New Mover | Solo Postcard 6" x 9" List - New Mover |
| SOLO_Postcard_6x9_Customer_Supplied | Postcard 6x9 Customer Supplied | Solo Postcard 6" x 9" List - Customer Supplied |
| SOLO_Postcard_6x11_Saturated | Postcard 6x11 Saturated | Solo Postcard 6" x 11" List - Saturated |
| SOLO_Postcard_6x11_Targeted | Postcard 6x11 Targeted | Solo Postcard 6" x 11" List - Targeted |
| SOLO_Postcard_6x11_New_Mover | Postcard 6x11 New Mover | Solo Postcard 6" x 11" List - New Mover |
| SOLO_Postcard_6x11_Customer_Supplied | Postcard 6x11 Customer Supplied | Solo Postcard 6" x 11" List - Customer Supplied |



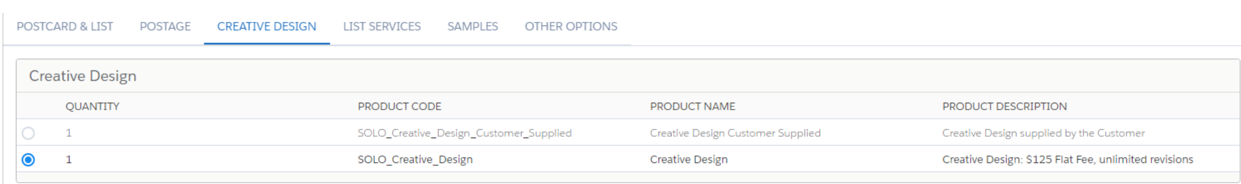
5. *Postage:* This will automatically be selected for you based on your previous selection.

POSTCARD & LIST | POSTAGE | CREATIVE DESIGN | LIST SERVICES | SAMPLES | OTHER OPTIONS

Postage

| PRODUCT CODE | PRODUCT NAME | PRODUCT DESCRIPTION |
|---|---|---|
| SOLO_Postage_Targeted | Postage Targeted | Solo Postage Targeted (Includes New Mover & Customer Supplied) |
| SOLO_Postage_Saturated | Postage Saturated | Solo Postage Saturated |
| SOLO_Postage_LifeEvent | Postage Life Event | Postage Life Event |

6. *Creative Design:* You can choose if the customer will supply the design or if Valpak will design it for them.

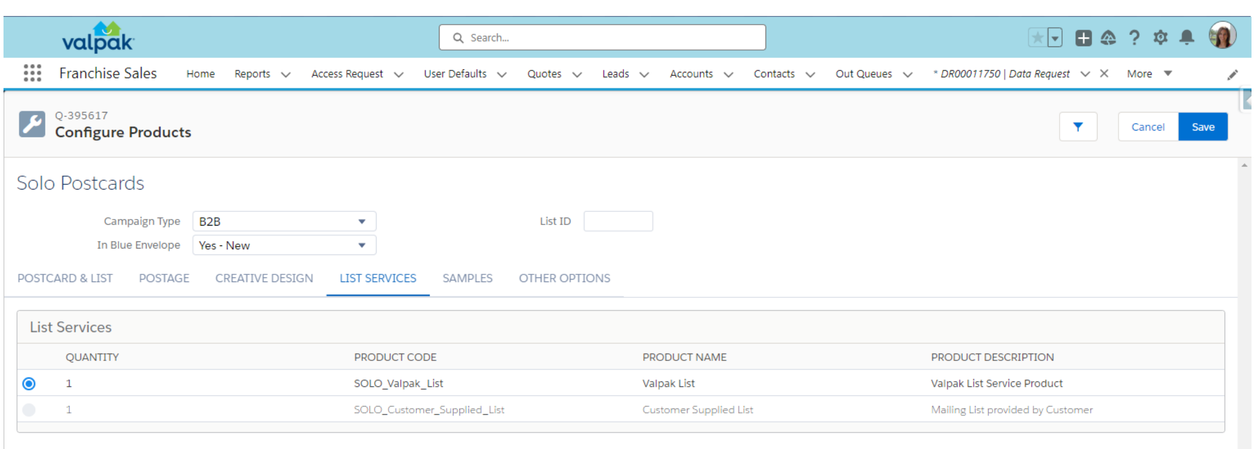


POSTCARD & LIST | POSTAGE | CREATIVE DESIGN | LIST SERVICES | SAMPLES | OTHER OPTIONS

Creative Design

| QUANTITY | PRODUCT CODE | PRODUCT NAME | PRODUCT DESCRIPTION |
|---|---|---|---|
| 1 | SOLO_Creative_Design_Customer_Supplied | Creative Design Customer Supplied | Creative Design supplied by the Customer |
| 1 | SOLO_Creative_Design | Creative Design | Creative Design: $125 Flat Fee, unlimited revisions |

7. *List Services:* Select either, Valpak List, if Valpak will be producing an Address List, or Customer Supplied List, if the Merchant will be providing an Address List.
8. *Samples:* Select samples if those will be included in this quote.
9. Click *Save*.



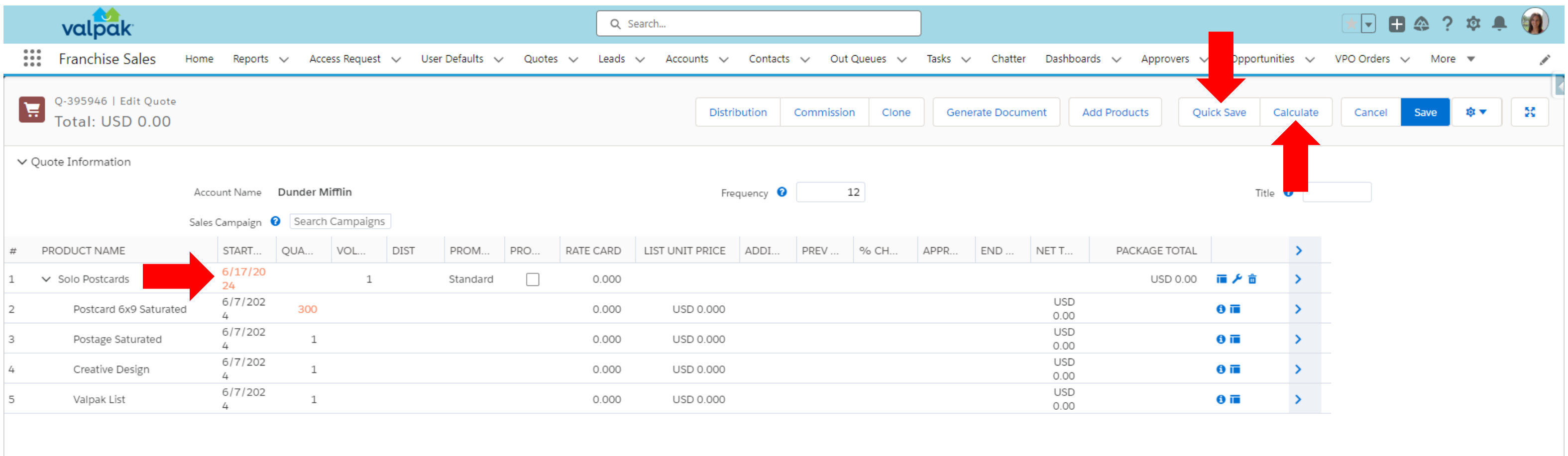


POSTCARD & LIST | POSTAGE | CREATIVE DESIGN | LIST SERVICES | SAMPLES | OTHER OPTIONS

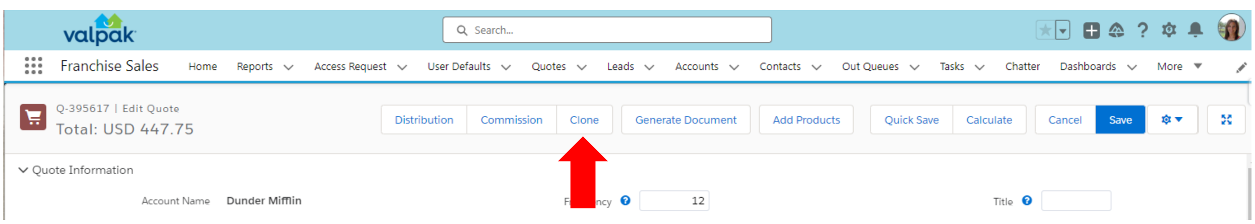
List Services

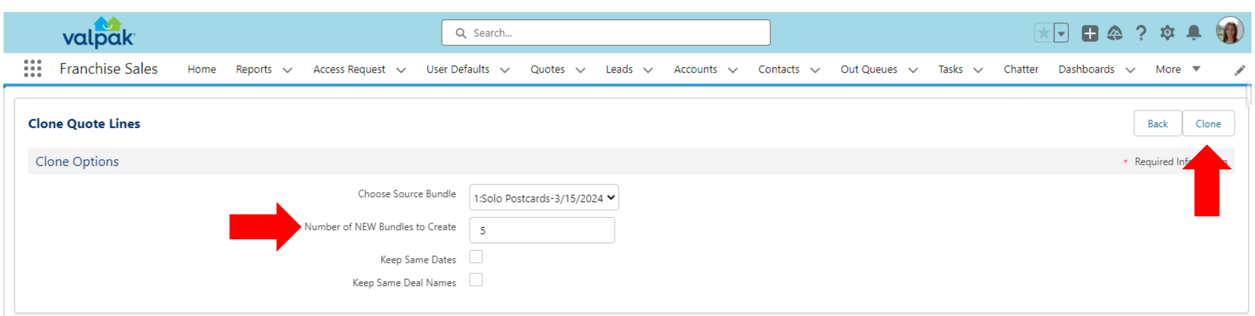
| QUANTITY | PRODUCT CODE | PRODUCT NAME | PRODUCT DESCRIPTION |
|---|---|---|---|
| 1 | SOLO_Valpak_List | Valpak List | Valpak List Service Product |
| 1 | SOLO_Customer_Supplied_List | Customer Supplied List | Mailing List provided by Customer |

10. Back on the Quote Edit page, update the Qty & Start Date. Standard SOLO can only be mailed on Monday to Friday with the exceptions of postal holidays.
    a. Click Calculate to update the mail dates properly.
11. Click *Quick Save*.

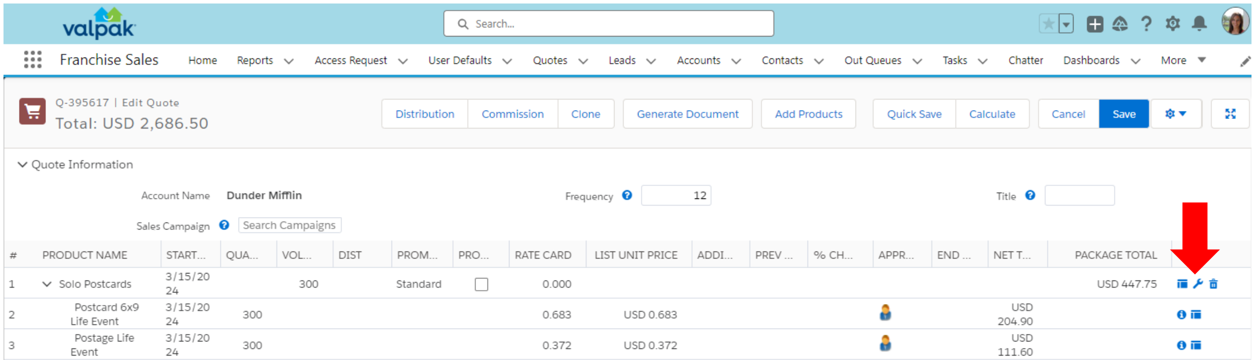


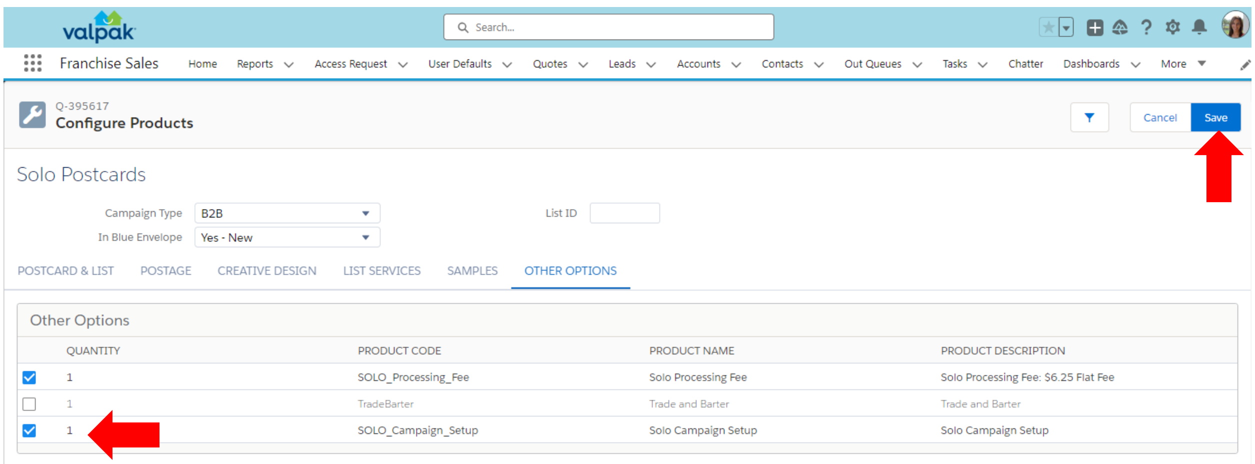
12. After you have completed your bundle, click *Clone*.
13. Make sure the *Number of New Bundles to Create* is correct and click *Clone*.



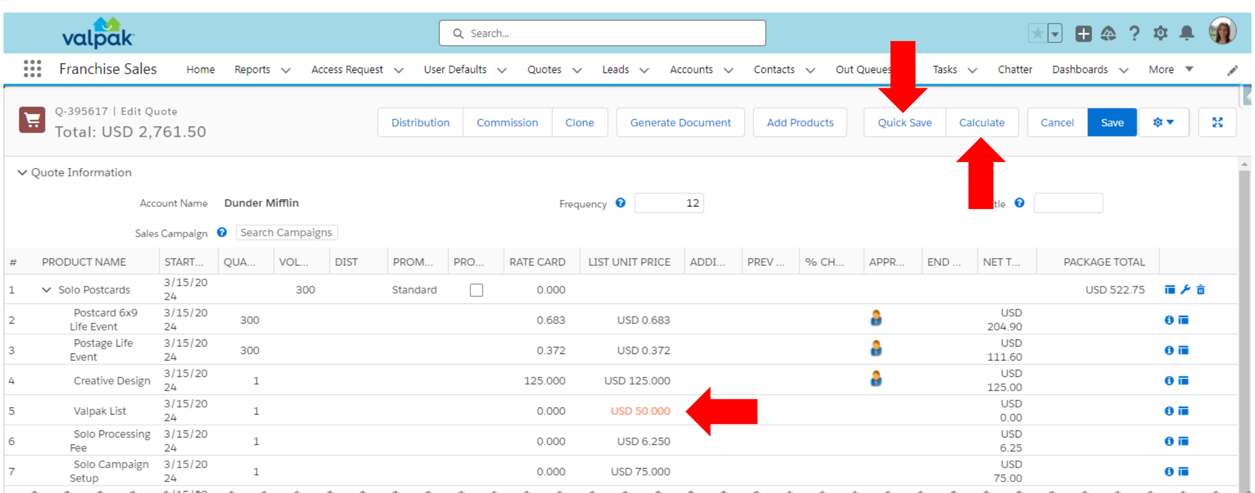


14. If the Client isn't currently mailing in the Blue Envelope, click the *Wrench* associated with the 1st bundle, and click *Other Options*.
15. Select *SOLO_Campaign_Setup* & click *Save*.

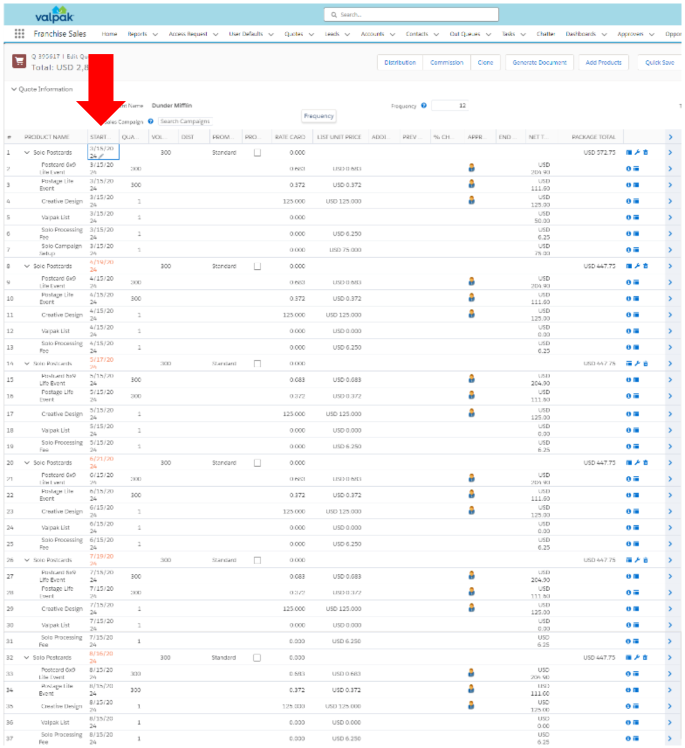


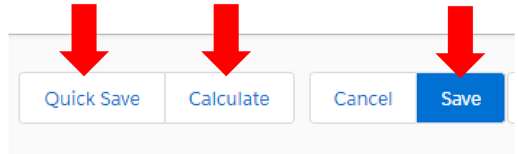




16. If your client said they wanted to purchase the list of address', add $50 to the *Valpak List* line. Click *Calculate* & *Quick Save*.

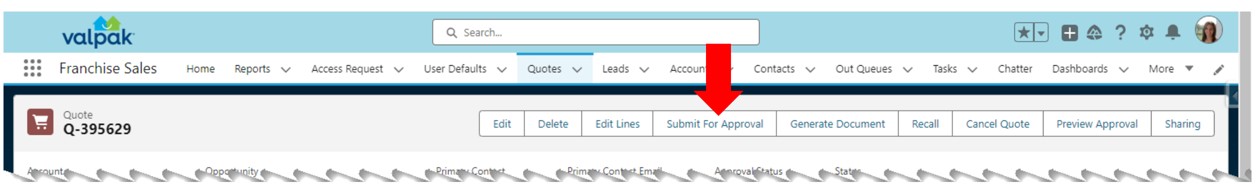


17. Go through all bundles and make sure the *Start Date* is Monday - Friday with the exception of holidays.
18. Click *Calculate & Quick Save*. If you are done editing the Quote, click *Save*.



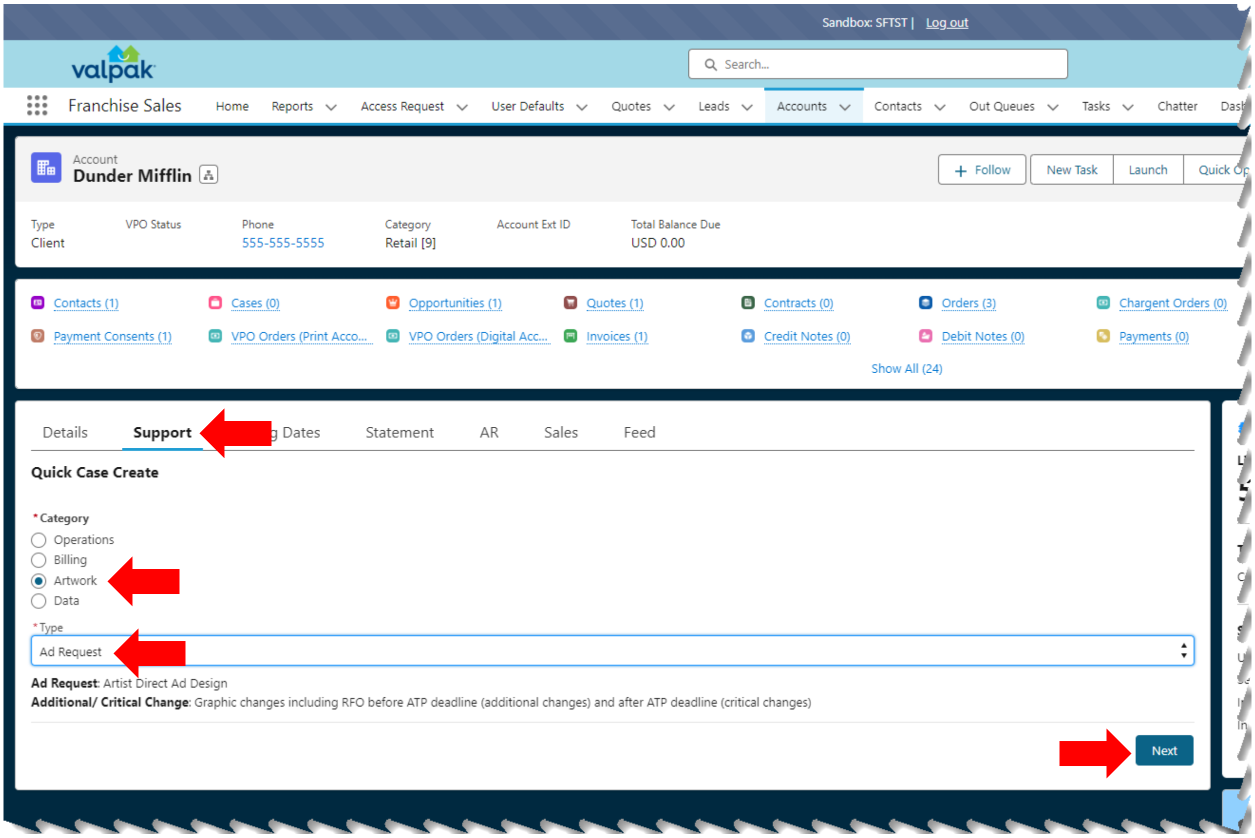




19. Click *Submit for Approval*.

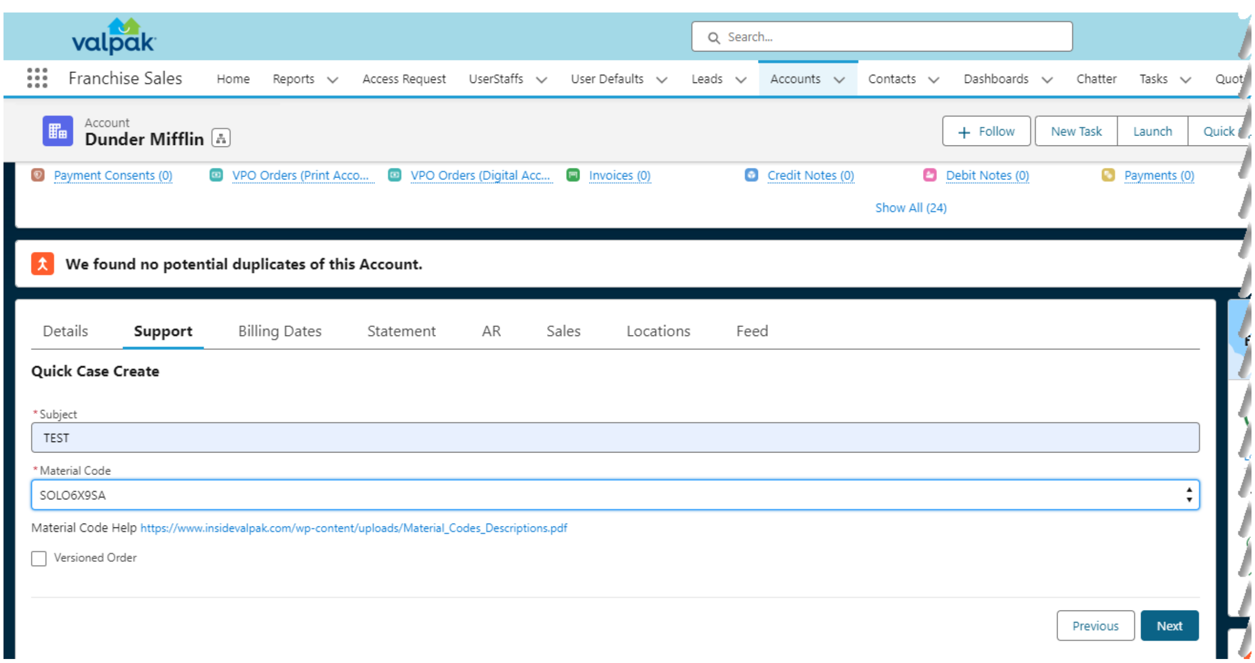


# Create a Standard SOLO AD Request:

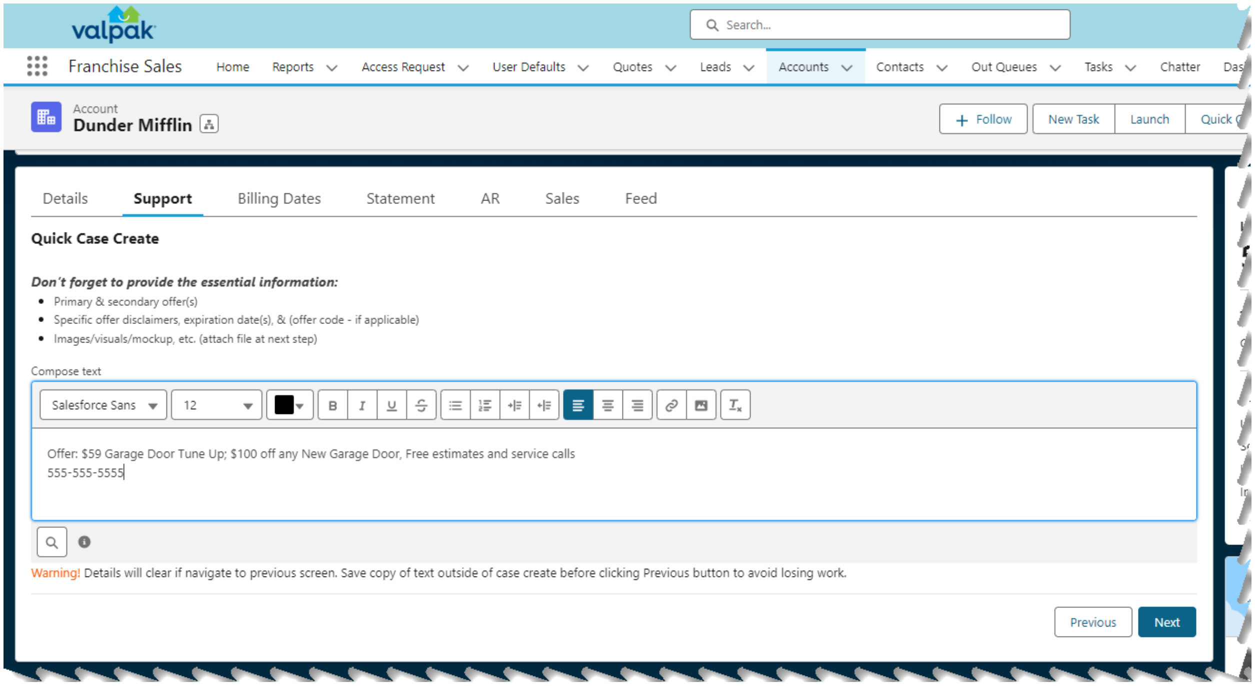
1. On the Account record, click Support, choose *Artwork* as the Category, *Ad Request* as the Type, and then click *Next*.



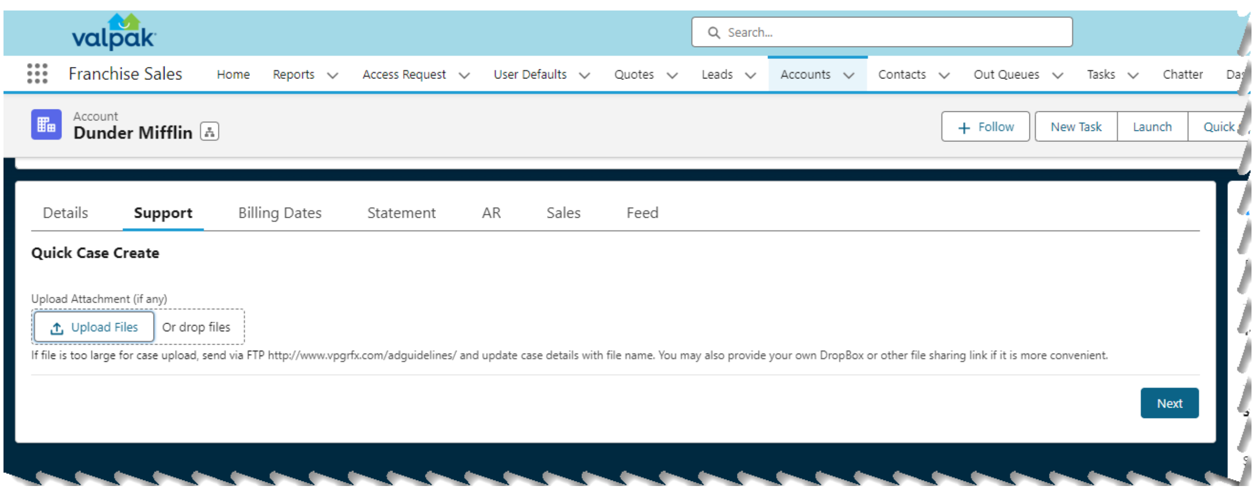

2. Fill in the required fields and click *Next*.



3. Enter in any additional information you have for the design team and click *Next*.




4. If the client wanted to submit their own creative design or has graphice they wish to see on their AD, upload them here and click *Next*.




5. You can either click on *Case* to access your new case or *Finish* to move onto another task.