

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.

The screenshot shows the valpak interface for the account 'Dunder Mifflin'. The 'Support' tab is selected, indicated by a red arrow. Below the tabs is the 'Quick Case Create' section. The 'Category' field has 'Data' selected, with a red arrow pointing to it. The 'Type' dropdown menu is set to 'List Request', also with a red arrow. A red arrow points to the 'Next' button at the bottom right of the form.

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.

The screenshot shows the 'Create New List Request' form in the 'Support' tab. The 'Information' section is visible. The 'List Type' field has three options: 'Saturated', 'Targeted', and 'Business', which are highlighted with a red bracket. The 'Subject' field contains 'New Request'. The 'Request Opened On Behalf Of (Optional)' field has a search box. The 'Comments' field is empty. The 'Account' field is set to 'Dunder Mifflin'. At the bottom right, there are 'Previous' and 'Next' buttons.

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.

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Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter

Account Dunder Mifflin

Follow New Task Launch Quick

Goal of Program

Who is the Target Audience?
Families

What is the budget?
\$200,000

Products/services will be featured?
PlusOne+
Solo
Valpak

Expected Count
50,000

Initial List Count (Pt. 1)

Request Type
Address Pull
List Count
List Order

* Data Return Format
Grand Total

Initial List Count (Pt. 2)

Requested Geography
Radius

* Radius Type
Distance

Address List Provided
 Use Client Billing Address

Number of Miles
50

Street
Test

City
Test 1

State
FL

Zip
33716

County

Additional Information

Dwelling Details
Provide More Detail

Dwelling Additional Info
SFDUs (Single Family Dwellings)
MFDUs (Multi-Family Dwellings)
PO Boxes
Trailers
Businesses

More Demographic Info

Previous 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.

The screenshot shows the Valpak account interface for 'Dunder Mifflin'. The top navigation bar includes 'Franchise Sales', 'Home', 'Reports', 'Access Request', 'User Defaults', 'Quotes', 'Leads', 'Accounts', and 'Contacts'. Below the navigation, there are buttons for '+ Follow', 'New Task', 'Launch', 'Quick Opportunity', and 'Quick'. The main content area has tabs for 'Details', 'Support', 'Billing Dates', 'Statement', 'AR', 'Sales', and 'Feed'. A 'Quick Case Create' section displays the message 'Successfully Created New Request'. Below this message, it says 'Click Here to navigate to new record:' followed by a blue link 'New Request' with a red arrow pointing to it. At the bottom right, there is a blue 'Finish' button with a red arrow pointing to it.

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

The screenshot shows the Valpak account interface for 'Dunder Mifflin' with a 'Data Request' record for 'DR00011750'. The top navigation bar includes 'Franchise Sales', 'Home', 'Reports', 'Access Request', 'User Defaults', 'Quotes', 'Leads', 'Accounts', 'Contacts', 'Out Queues', and a search bar. Below the navigation, there are buttons for '+ Follow', 'Clone Request', and 'Edit'. The main content area has tabs for 'Details', 'Siblings View', 'Chatter', 'Team Help', and 'Activity'. The 'Details' tab is active, showing a table of information for the data request. A red arrow points to the 'Files (0)' tab, which is highlighted. The 'Files (0)' tab is currently empty. The 'Chatter' tab is also visible, showing a 'Post' section with a 'Share an update...' button and a 'Share' button. The bottom navigation bar includes 'Recent Items', 'Help and Support', 'Daily Dashboards & Reports', 'Daily List Views', 'CPQ Help Links', 'Payment Help Links', 'Salesforce Help Links', 'Sales Tools', 'Recent Enhancements', and 'To Do List'.

Account	Franchise Name	Requestor User	Requestor Email	Record Type	Type Requested
Dunder Mifflin	Valpak of Kings County	Katie Melech	katie_melech@valpak.com	List Request	Life Event

Data Request Name	Data Request Status
DR00011750	Coordinator Review

Type Requested	Requestor User
Life Event	Katie Melech

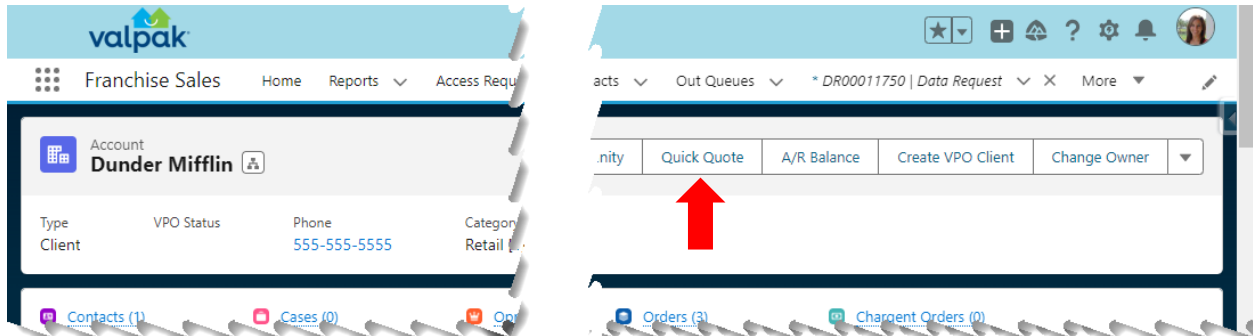
Subject	Requestor Phone
	(727) 568-4375

Reference Request	Requestor Email
	katie_melech@valpak.com

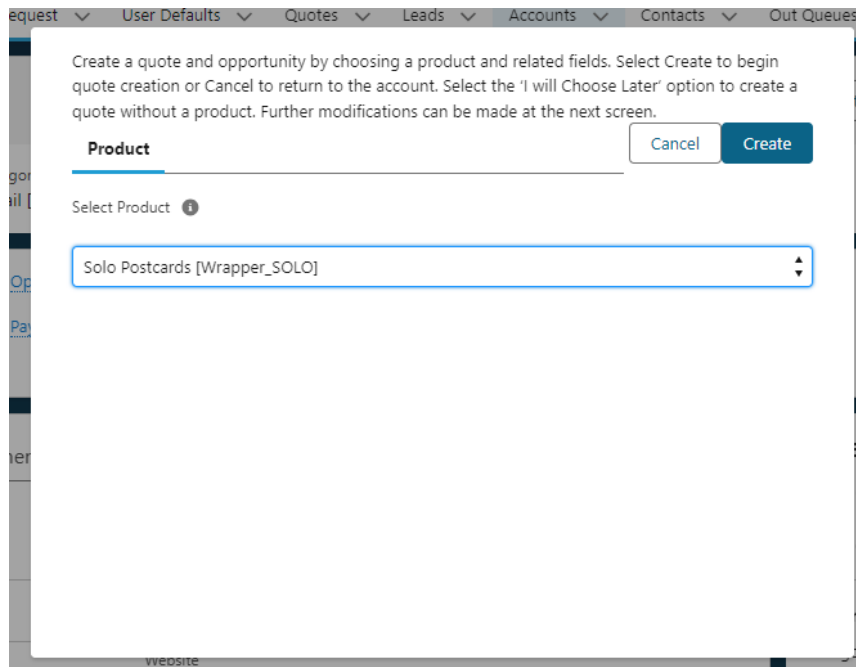
Account	Date Created

Create a Standard SOLO Quote:

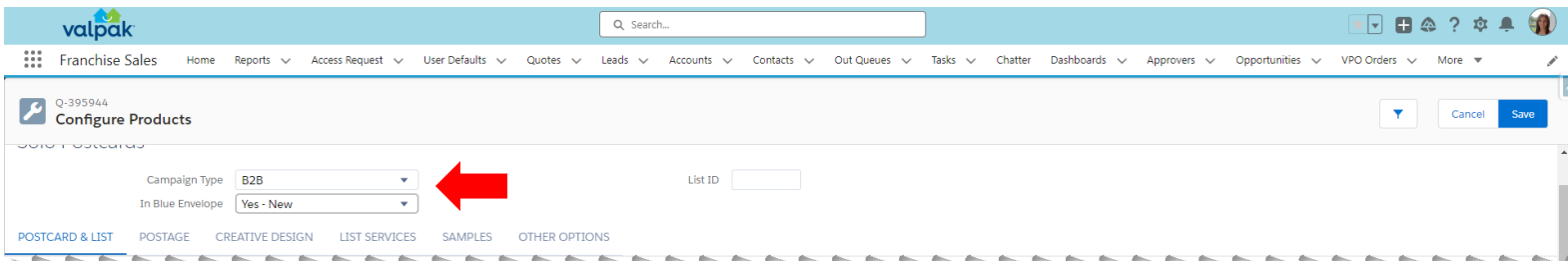
1. On the Account record, click *Quick Quote*.



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.

In Blue Envelope Yes New

POSTCARD & LIST POSTAGE CREATIVE DESIGN LIST SERVICES SAMPLES OTHER OPTIONS

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

Recent Items Help and Support Daily Dashboards & Reports Daily List Views CPQ Help Links Payment Help Links Salesforce Help Links Sales Tools Recent Enhancements To Do List

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
<input type="radio"/> SOLO_Postage_Targeted	Postage Targeted	Solo Postage Targeted (Includes New Mover & Customer Supplied)
<input checked="" type="radio"/> SOLO_Postage_Saturated	Postage Saturated	Solo Postage Saturated
<input type="radio"/> 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
<input type="radio"/> 1	SOLO_Creative_Design_Customer_Supplied	Creative Design Customer Supplied	Creative Design supplied by the Customer
<input checked="" type="radio"/> 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.

valpak Q Search...

Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues *DR00011750 | Data Request X More

Q-395617 Configure Products

Solo Postcards

Campaign Type List ID

In Blue Envelope

POSTCARD & LIST POSTAGE CREATIVE DESIGN LIST SERVICES SAMPLES OTHER OPTIONS

List Services			
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input checked="" type="radio"/> 1	SOLO_Valpak_List	Valpak List	Valpak List Service Product
<input type="radio"/> 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*.

Q-395946 | Edit Quote
Total: USD 0.00

Quote Information

Account Name: Dunder Mifflin
Frequency: 12

#	PRODUCT NAME	START...	QUA...	VOL...	DIST	PROM...	PRO...	RATE CARD	LIST UNIT PRICE	ADDI...	PREV...	% CH...	APPR...	END...	NET T...	PACKAGE TOTAL
1	Solo Postcards	6/17/2024		1		Standard		0.000								USD 0.00
2	Postcard 6x9 Saturated	6/7/2024	300					0.000	USD 0.000						USD 0.00	
3	Postage Saturated	6/7/2024		1				0.000	USD 0.000						USD 0.00	
4	Creative Design	6/7/2024		1				0.000	USD 0.000						USD 0.00	
5	Valpak List	6/7/2024		1				0.000	USD 0.000						USD 0.00	

12. After you have completed your bundle, click *Clone*.

13. Make sure the *Number of New Bundles to Create* is correct and click *Clone*.

Q-395617 | Edit Quote
Total: USD 447.75

Quote Information

Account Name: Dunder Mifflin
Frequency: 12

Clone Quote Lines

Clone Options

Choose Source Bundle: 1: Solo Postcards-3/15/2024

Number of NEW Bundles to Create: 5

Keep Same Dates:

Keep Same Deal Names:

Back 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*.

Quote Information

Account Name: Dunder Mifflin
Frequency: 12

#	PRODUCT NAME	START...	QUA...	VOL...	DIST	PROM...	PRO...	RATE CARD	LIST UNIT PRICE	ADDI...	PREV ...	% CH...	APPR...	END ...	NET T...	PACKAGE TOTAL
1	Solo Postcards	3/15/2024		300		Standard	<input type="checkbox"/>	0.000								USD 447.75
2	Postcard 6x9 Life Event	3/15/2024		300				0.683	USD 0.683						USD	204.90
3	Postage Life Event	3/15/2024		300				0.372	USD 0.372						USD	111.60

Configure Products

Campaign Type: B2B
In Blue Envelope: Yes - New

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

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input checked="" type="checkbox"/> 1	SOLO_Processing_Fee	Solo Processing Fee	Solo Processing Fee: \$6.25 Flat Fee
<input type="checkbox"/> 1	TradeBarter	Trade and Barter	Trade and Barter
<input checked="" type="checkbox"/> 1	SOLO_Campaign_Setup	Solo Campaign Setup	Solo Campaign Setup

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

Quote Information

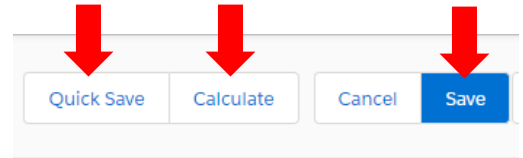
Account Name: Dunder Mifflin
Frequency: 12

#	PRODUCT NAME	START...	QUA...	VOL...	DIST	PROM...	PRO...	RATE CARD	LIST UNIT PRICE	ADDI...	PREV ...	% CH...	APPR...	END ...	NET T...	PACKAGE TOTAL
1	Solo Postcards	3/15/2024		300		Standard	<input type="checkbox"/>	0.000								USD 522.75
2	Postcard 6x9 Life Event	3/15/2024		300				0.683	USD 0.683						USD	204.90
3	Postage Life Event	3/15/2024		300				0.372	USD 0.372						USD	111.60
4	Creative Design	3/15/2024		1				125.000	USD 125.000						USD	125.00
5	Valpak List	3/15/2024		1				0.000	USD 50.000						USD	0.00
6	Solo Processing Fee	3/15/2024		1				0.000	USD 6.250						USD	6.25
7	Solo Campaign Setup	3/15/2024		1				0.000	USD 75.000						USD	75.00

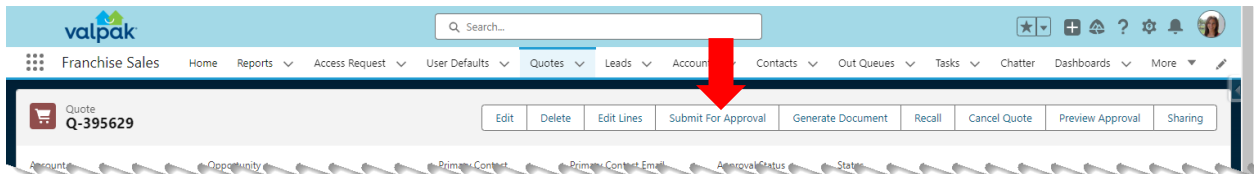
17. Go through all bundles and make sure the *Start Date* is Monday - Friday with the exception of holidays.

18. Click *Calculate & Quick Save*. If you are done editing the Quote, click *Save*.

PRODUCT NAME	START	QUA.	UNIT PRICE	AMOUNT	UNIT PRICE	AMOUNT	NETT.	PACKAGE TOTAL
1. Postcard (Std) 24	5/15/20	300	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
2. Postcard (Std) 24	5/15/20	300	0.372	USD 111.600	USD 111.600	USD 111.600	USD 111.600	USD 111.600
3. Creative Design 24	5/15/20	1	125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000
4. Vapour List 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
5. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
6. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
7. Postcard (Std) 24	5/15/20	300	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
8. Postcard (Std) 24	5/15/20	300	0.372	USD 111.600	USD 111.600	USD 111.600	USD 111.600	USD 111.600
9. Creative Design 24	5/15/20	1	125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000
10. Vapour List 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
11. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
12. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
13. Postcard (Std) 24	5/15/20	300	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
14. Postcard (Std) 24	5/15/20	300	0.372	USD 111.600	USD 111.600	USD 111.600	USD 111.600	USD 111.600
15. Creative Design 24	5/15/20	1	125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000
16. Vapour List 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
17. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
18. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
19. Postcard (Std) 24	5/15/20	300	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
20. Postcard (Std) 24	5/15/20	300	0.372	USD 111.600	USD 111.600	USD 111.600	USD 111.600	USD 111.600
21. Creative Design 24	5/15/20	1	125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000
22. Vapour List 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
23. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
24. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
25. Postcard (Std) 24	5/15/20	300	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
26. Postcard (Std) 24	5/15/20	300	0.372	USD 111.600	USD 111.600	USD 111.600	USD 111.600	USD 111.600
27. Creative Design 24	5/15/20	1	125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000
28. Vapour List 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
29. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
30. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
31. Postcard (Std) 24	5/15/20	300	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
32. Postcard (Std) 24	5/15/20	300	0.372	USD 111.600	USD 111.600	USD 111.600	USD 111.600	USD 111.600
33. Creative Design 24	5/15/20	1	125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000	USD 125.000
34. Vapour List 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
35. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000
36. Sales Processing Fee 24	5/15/20	1	0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000	USD 0.000



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*.

The screenshot shows the Valpak account record for Dunder Mifflin. The 'Support' tab is selected, indicated by a red arrow. The 'Quick Case Create' form is visible, with the following fields and selections:

- * Category: Artwork (indicated by a red arrow)
- * Type: Ad Request (indicated by a red arrow)
- Additional/ Critical Change: Graphic changes including RFO before ATP deadline (additional changes) and after ATP deadline (critical changes)
- Next button: (indicated by a red arrow)

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

The screenshot shows the Valpak account record for Dunder Mifflin. The 'Support' tab is selected. The 'Quick Case Create' form is visible, with the following fields and values:

- * Subject: TEST
- * Material Code: SOLO6X95A
- Material Code Help: https://www.insidevalpak.com/wp-content/uploads/Material_Codes_Descriptions.pdf
- Versioned Order:
- Next button: (indicated by a red arrow)

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

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Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter

Account Dunder Mifflin

+ Follow New Task Launch Quick C

Details **Support** Billing Dates Statement AR Sales Feed

Quick Case Create

Don't forget to provide the essential information:

- Primary & secondary offer(s)
- Specific offer disclaimers, expiration date(s), & (offer code - if applicable)
- Images/visuals/mockup, etc. (attach file at next step)

Compose text

Salesforce Sans 12 B I U S

Offer: \$59 Garage Door Tune Up; \$100 off any New Garage Door, Free estimates and service calls
555-555-5555

Warning! Details will clear if navigate to previous screen. Save copy of text outside of case create before clicking Previous button to avoid losing work.

Previous Next

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

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Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter

Account Dunder Mifflin

+ Follow New Task Launch Quick C

Details **Support** Billing Dates Statement AR Sales Feed

Quick Case Create

Upload Attachment (if any)

Upload Files Or drop files

If file is too large for case upload, send via FTP <http://www.vpgrfx.com/adguidelines/> and update case details with file name. You may also provide your own DropBox or other file sharing link if it is more convenient.

Next

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

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Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter

Account Dunder Mifflin

+ Follow New Task Launch Quick C

Details **Support** Billing Dates Statement AR Sales Feed

Quick Case Create

Case successfully created!

Please press **Finish** to return back to the Account.

Finish