

SOLO Life Event

Creating a SOLO Life Event 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 account record for 'Dunder Mifflin'. The 'Support' tab is selected, indicated by a red arrow. Below the tabs is the 'Quick Case Create' section. Under '*Category', the 'Data' radio button is selected, indicated by a red arrow. Under '*Type', 'List Request' is selected in the dropdown menu, also indicated by a red arrow. A red arrow points to the 'Next' button at the bottom right of the form.

3. Choose Life Event 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. The 'Information' section is expanded. Under '*List Type', the 'Life Event' radio button is selected, indicated by a red arrow. Other fields include 'Subject' (New List Request), 'Request Opened On Behalf Of (Optional)' (Search People...), 'Comments', and '*Account' (Dunder Mifflin).

4. Fill in all the required fields under *Life Event Mailer*.
 - a. *Program*: Depending on your selection, additional optional and/or required fields will appear.
 - b. *Start Month/Week/Year*: Select the month to start, 1st or 3rd Friday of the month, and change the year if necessary.
 - c. *Contract Length/Min Qty/Max Qty*: 6/12 month contract, min qty (can't be less than 250), Max Qty (give a range of zips to be found).
 - d. *Seed Address for Client*: Where the client wants their program sent to.
 - e. *Seed Address for Sales Rep*: Where the rep wants their program sent to.

The screenshot shows the 'Life Event Mailer' form in the Valpak system. The form is titled 'Life Event Mailer' and is for the account 'Dunder Mifflin'. The form is divided into several sections:

- Program Information:**
 - * Program: New Movers
 - * Program Option: -- none selected --
 - Side 1 Personalization: --None--
 - Side 2 Personalization: --None--
- Start Date:**
 - * Start Month: 8
 - * Week: 12 (selected)
 - * Start Year: 2,024
- Contract and Quantity:**
 - * Contract Length: 12 (selected)
 - * Min Qty: 300
 - * Max Qty: 400
- Seed Address for Client:**
 - * First Name: [Redacted]
 - * Last Name: [Redacted]
 - * Street: [Redacted]
 - * City: [Redacted]
 - * State: --None--
 - * Zip Code: [Redacted]
- Seed Address for Sales Rep:**
 - * First Name: [Redacted]
 - * Last Name: [Redacted]
 - * Street: [Redacted]
 - * City: [Redacted]
 - * State: --None--
 - * Zip Code: [Redacted]
- Additional Options:**
 - Suppression List Provided
 - Client Copy Requested
 - * Zip Code Selections: [Redacted]
 - [Zip Code Selection Tool](#)

Navigation buttons 'Previous' and 'Next' are located at the bottom right of the form.

5. Click on the Zip Code Selection Tool link.

This screenshot is identical to the previous one, showing the 'Life Event Mailer' form. A red arrow is added, pointing upwards to the 'Zip Code Selection Tool' link located next to the 'Zip Code Selections' field.

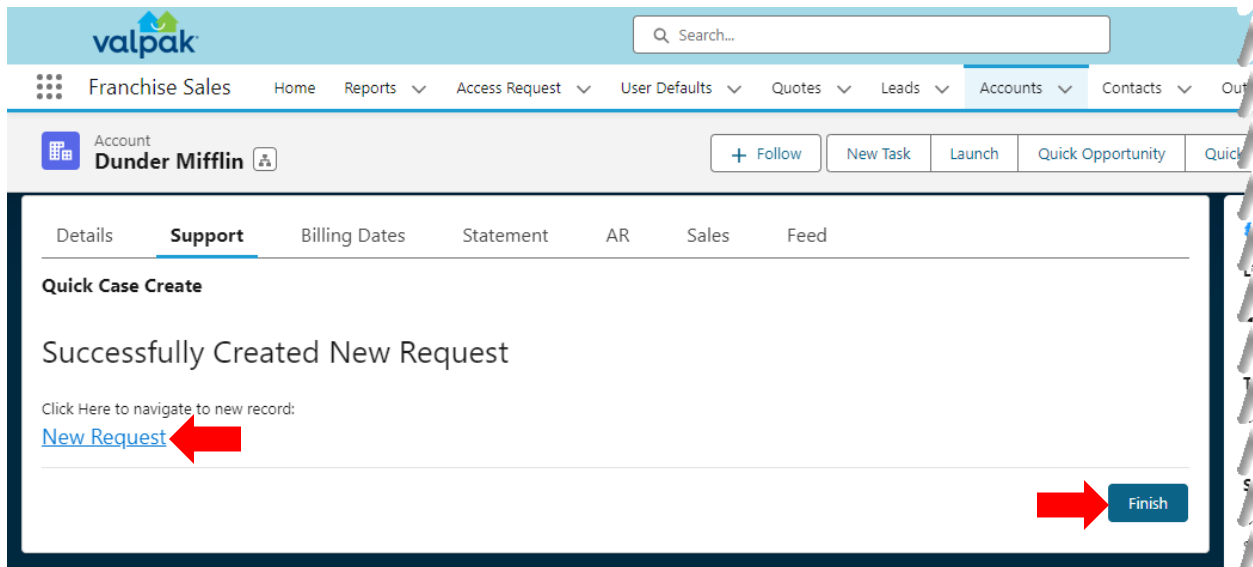
6. This link will open in a new window.
7. Select the Zip Codes you want and then click Copy.
 - a. Navigate back to the Salesforce Tab.

The screenshot shows the 'Life Event Zips' interface in Valpak. It features a table with columns for Zip, City, County, State, CSEA, DMA, Primary NTA, Franchise, 1 Touch Avg, 1 Touch Last Mailing, 2 Touch Avg, and 2 Touch Last Mailing. The table lists various zip codes such as 01001, 01002, 01003, etc., with their corresponding data. Below the table, there are 'Selected Zips' and 'Totals' sections. A 'Copy' button is visible at the bottom right of the table area.

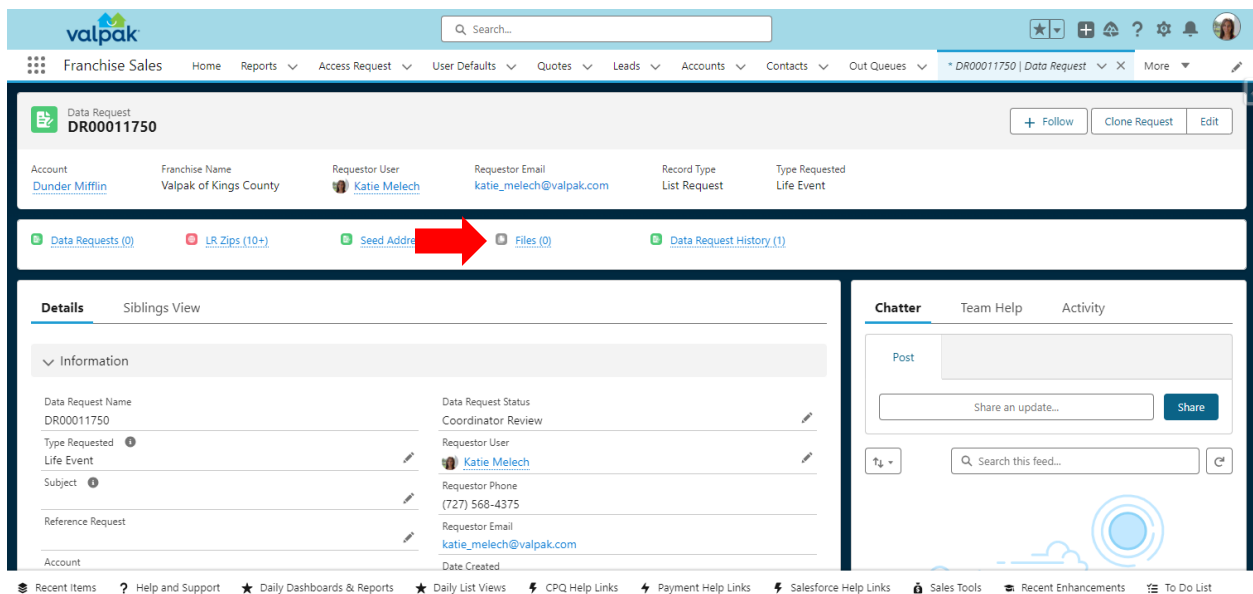
8. Past the Zips you selected into the Zip Code Selections Box.
 - a. *Suppression List Provided*: If the client has a list of Zips they wish to exclude from their mailings.
 - b. *Client Copy Requested*: If the client wishes to purchase a copy of the zip codes that they will be mailing to.
9. Click Next.

The screenshot shows the account setup form for 'Dunder Mifflin'. The form includes fields for Program (1-Year Home Anniversary), Program Option (none selected), Side 1 Personalization (None), Side 2 Personalization (None), Start Month (3), Week (3), Start Year (2,024), Contract Length (6), Min Qty (300), Max Qty (400), and Zip Code Selections. The Zip Code Selections field contains the text '01001,01002,01003,01004,0105,01007,01008,01009,01010,0'. Red arrows point to the 'Suppression List Provided' checkbox, the 'Client Copy Requested' checkbox, the Zip Code Selections field, and the 'Next' button at the bottom right.

10. You can click on New Request to View the request you just created or click Finish to move onto the next step.

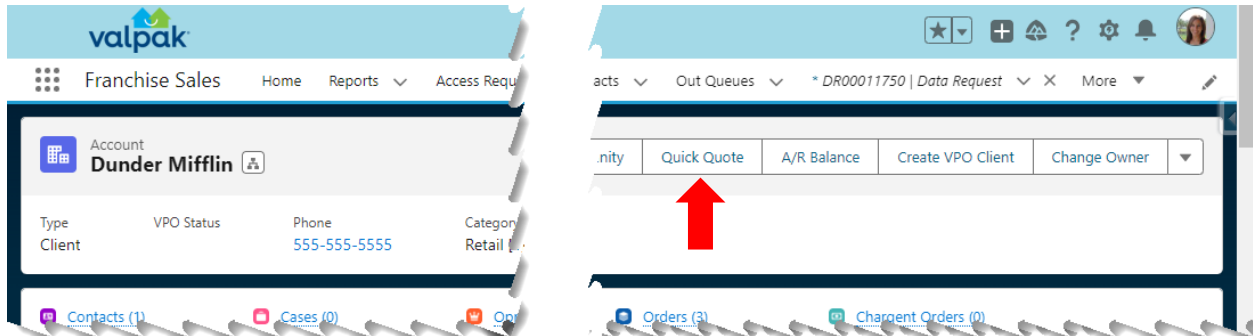


11. If you checked that the client had a list of Zips they wanted to suppress, you will need to add them to the Request under Files.

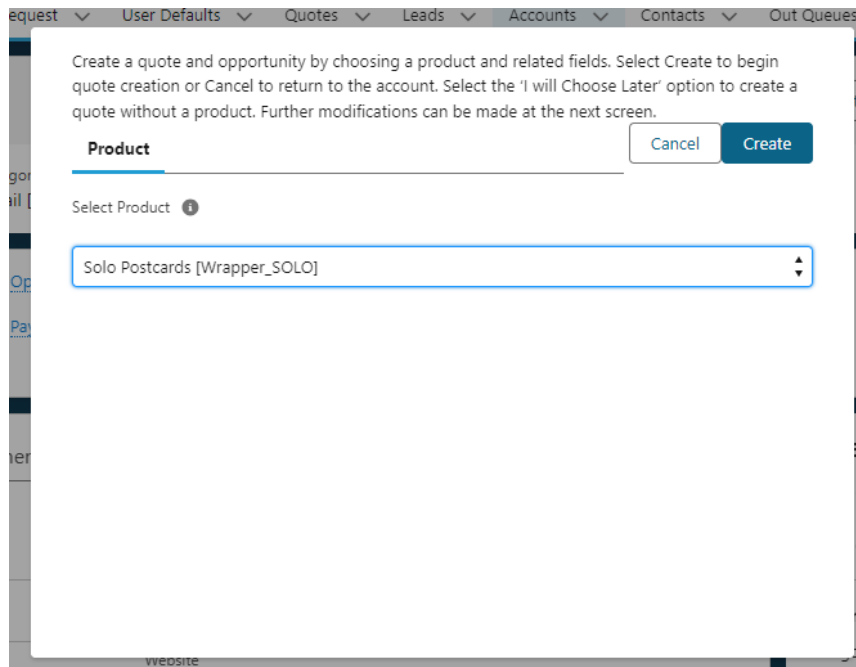


Create a SOLO Life Event Quote:

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

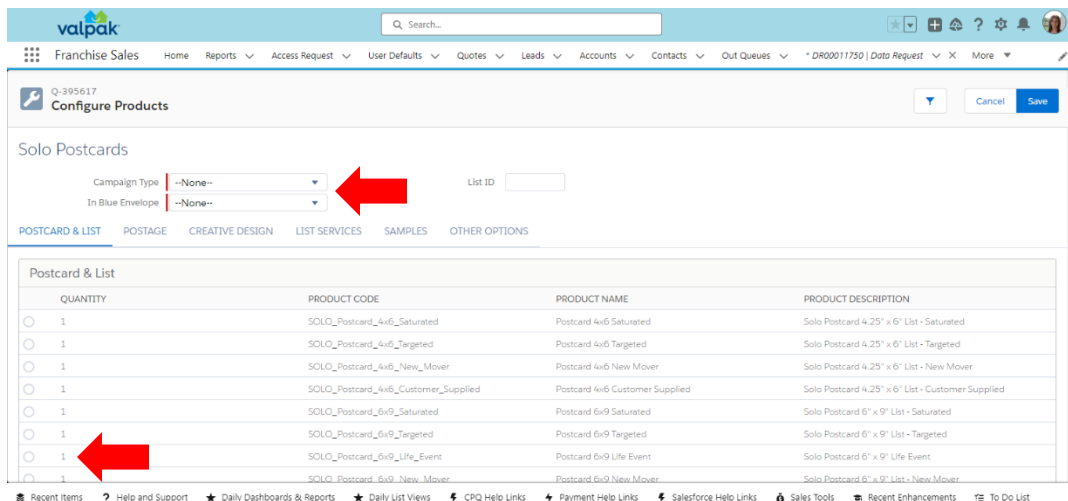


2. Select *Solo Postcards [Wrapper_SOLO]* and then click *Create*.



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

4. *Postcard & List*: Select the *SOLO_Postcard_6x9_Life_Event*



5. **Postage:** This will automatically be selected for you.

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

Postage			
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input type="radio"/> 1	SOLO_Postage_Targeted	Postage Targeted	Solo Postage Targeted (Includes New Mover & Customer Supplied)
<input type="radio"/> 1	SOLO_Postage_Saturated	Postage Saturated	Solo Postage Saturated
<input checked="" type="radio"/> 1	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:** There is only one option that can be selected here.
- 8. **Samples:** These are currently not available for SOLO Life Events.
- 9. **Click Save.**

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

Q-395617 **Configure Products** Cancel Save

Solo Postcards

Campaign Type: B2B List ID:

In Blue Envelope: Yes - New

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, change the Qty & Start Date to match the List Request.
 - a. Click Calculate to update the mail dates properly.
- 11. Click **Quick Save**.

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

Q-395617 | Edit Quote Total: USD 6.25 Distribution Commission Clone Generate Document Add Products Quick Save Calculate Cancel Save

Quote Information

Account Name: Dunder Mifflin Frequency: 12

#	PRODUCT NAME	START...	QUA...	VOL...	DIST	PROM...	PRO...	RATE CARD	LIST UNIT PRICE	ADDL...	PREV ...	% CH...	APPR...	END ...	NET T...	PACKAGE TOTAL
1	Solo Postcard Life Event	3/15/2024	1		Standard			0.000								USD 6.25
2	Postcard Life Event	2/2/2024	300					0.000	USD 0.000							USD 0.00
3	Postage Life Event	2/2/2024	1					0.000	USD 0.000							USD 0.00
4	Creative Design	2/2/2024	1					0.000	USD 0.000							USD 0.00
5	Valpak List	2/2/2024	1					0.000	USD 0.000							USD 0.00
6	Solo Processing Fee	2/2/2024	1					0.000	USD 6.250							USD 6.25

Subtotal: USD 6.25

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

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

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

The screenshot shows the Valpak interface for editing a quote (Q-395617) with a total of USD 447.75. The 'Clone' button is highlighted with a red arrow. The 'Quote Information' section shows the account name 'Dunder Mifflin' and a frequency of 12.

The 'Clone Quote Lines' dialog box is shown. The 'Clone Options' section includes a dropdown for 'Choose Source Bundle' set to '1: Solo Postcards-3/15/2024'. The 'Number of NEW Bundles to Create' is set to 5. The 'Clone' button is highlighted with a red arrow.

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*.

The screenshot shows the Valpak interface with a quote total of USD 2,686.50. The 'Other Options' tab is selected for the first bundle. A red arrow points to the 'Wrench' icon in the first row of the bundle list.

#	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	

The 'Configure Products' dialog box is shown for 'Solo Postcards'. The 'Other Options' table has 'SOLO_Campaign_Setup' selected. The 'Save' button is highlighted with a red arrow.

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		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 the 1st or 3rd Friday of every month.

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

Quick Save Calculate Cancel Save

19. Click *Submit for Approval*.

Quote Q-395629

Edit Delete Edit Lines Submit for Approval Generate Document Recall Cancel Quote Preview Approval Sharing

Create a SOLO Life Event AD Request:

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

Sandbox: SFTST | Log out

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

Account Dunder Mifflin

+ Follow New Task Launch Quick Op

Type	VPO Status	Phone	Category	Account Ext ID	Total Balance Due
Client		555-555-5555	Retail [9]		USD 0.00

Contacts (1) Cases (0) Opportunities (1) Quotes (1) Contracts (0) Orders (3) Charged Orders (0)
Payment Consents (1) VPO Orders (Print Acco... VPO Orders (Digital Acco... Invoices (1) Credit Notes (0) Debit Notes (0) Payments (0)

Show All (24)

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

Quick Case Create

* Category
 Operations
 Billing
 Artwork
 Data

* Type
Ad Request

Ad Request: Artist Direct Ad Design
Additional/ Critical Change: Graphic changes including RFO before ATP deadline (additional changes) and after ATP deadline (critical changes)

Next

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

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

Account Dunder Mifflin

+ Follow New Task Launch Quick Op

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

Quick Case Create

* Subject
TEST REQUEST

* Material Code
SOLO6X9LE

Material Code Help https://www.insidevalpak.com/wp-content/uploads/Material_Codes_Descriptions.pdf

Versioned Order

Life Event Personalization

Personalization text should have brackets around placeholder.
Ex. Happy Birthday <First_Name>!
Ex. Welcome to the Neighborhood <Last_Name> Family!

* Side 1 Personalization Count 1
d

* Side 2 Personalization Count 1
2

* Side 2 Personalization Text 1
Welcome!

* Side 2 Personalization Text 2
Welcome!

Note personalization is not allowed on Medicare programs.

Previous Next

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

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

The screenshot shows the Valpak web interface for account 'Dunder Mifflin'. The 'Support' tab is active. Under 'Quick Case Create', there is a section titled 'Don't forget to provide the essential information:' with a bulleted list: 'Primary & secondary offer(s)', 'Specific offer disclaimers, expiration date(s), & (offer code - if applicable)', and 'Images/visuals/mockup, etc. (attach file at next step)'. Below this is a 'Compose text' area with a rich text editor. The text entered is: 'Offer: \$59 Garage Door Tune Up; \$100 off any New Garage Door, Free estimates and service calls 555-555-5555'. A warning message states: '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.' The 'Next' button is highlighted.

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*.

The screenshot shows the Valpak web interface for account 'Dunder Mifflin'. The 'Support' tab is active. Under 'Quick Case Create', there is an 'Upload Attachment (if any)' section with an 'Upload Files' button and the text 'Or drop files'. Below this is a note: '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.' The 'Next' button is highlighted.

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

The screenshot shows the Valpak web interface for account 'Dunder Mifflin'. The 'Support' tab is active. Under 'Quick Case Create', there is a success message: 'Case successfully created!'. Below this is the instruction: 'Please press Finish to return back to the Account.' The 'Finish' button is highlighted.