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.

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											Next

- 3. Choose Life Event as the List Type under Information.
 - a. It's best practice to fill in as many fields as possible.

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- 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.

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5. Click on the Zip Code Selection Tool link.

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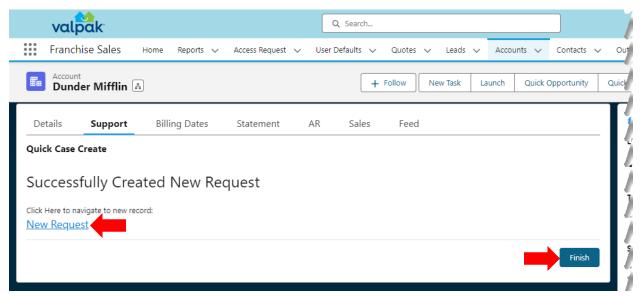
- 6. This link will open in a new window.
- 7. Select the Zip Codes you want and then click Copy.
 - a. Navigate back to the Salesforce Tab.

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Event Zips												
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01002	AMMERST	HAMPSHIRE	MA	Springfield, MA	Springfield-Holyoke, MA	3537A8	Western Massachusetts	16	21	33	39	
01003	AMHERST	HAMPSHIRE	MA	Springfield, MA	Springfield-Holyoke, MA		Western Massachusetts	0	0	0	0	
01004	AMHERST	HAMPSHIRE	MA	Springfield, MA	Springfield-Holyoka, MA		Western Massachusetts	0	0	0	0	
01005	BARRE	WORCESTER	MA	Worcester, MA	Boston (Manchester), MA-NH		Boston	\$	11	10	18	
01007	BELCHERTOWN	HAMPSHIRE	MA	Springfield, MA	Springfield-Holyoke, MA	3537A8	Western Massachusetts	17	12	33	25	
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01020	CHICOPEE	HAMPDEN	MA	Springfield, MA	Springfield-Holyoka, MA	3537CNS	Western Massachusetts	28	15	55	36	
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01008	AMHERST	HAMPSHIRE	MA	Springfield, MA	Springfield-Holyoke, MA		Western Massachusetts	0	0	0	0	
01004	AMHERST	HAMPSHIRE	MA	SpringSeld, MA	Springfield-Holyoka, MA		Western Massachusetts	0	0	0	0	
01005	BARRE	WORCESTER	MA	Worcester, MA	Boston (Manchester), MA-NH		Boston	5	11	10	16	
01007	BELCHERTOWN	HAMPSHIRE	MA	Springfield, MA	Springfield-Holyoka, MA	3537AB	Western Massachusetts	17	12	33	3	
01008	BLANDFORD	HAMPDEN	MA	Springfield, MA	Springfield-Holyoka, MA		Western Massachusetts	0	0	0	0	
01009	BONDSVILLE	HAMPOEN	MA	Springfield, MA	Springfield-Holyoka, MA		Wastern Massachusetts	0	0	0	0	
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01013	CHICOPEE	HAMPOEN	MA	Springfield, MA	Springfield-Holyoka, MA	3537CNS	Western Massachusetts	10	10	35	19	
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Last Updated: 2023-10-06												

- 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.

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*Zip Code	Zip Code		Next

10. You can click on New Request to View the request you just createed 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.

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Account Dunder Mifflin	Franchise Name Valpak of Kings County	Requestor User	Requestor Email katie_melech@valpak.com	Record Type List Request	Type Requested Life Event	I		
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Create a SOLO Life Event Quote:

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

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E Acc Du	ount Inder Mifflin 🗈			.nity	Quick Quote	A/R Balance	Create VPO Client	Change Owner	•
Type Client	VPO Status	Phone 555-555-5555	Categon Retail [T				
Contac	ts (1)	Cases (0)			Orders (3)	Cha	argent Orders (0)		~

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

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- 3. Select a Campaign Type & In Blue Envelope.
- 4. Postcard & List: Select the SOLO_Postcard_6x9_Life_Event

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

OSTCARD & LIST	POSTAGE	CREATIVE DESIGN	LIST SERVICES	SAMPLES	OTHER OPTIONS		
Postage							
QUANTITY			PRODUCT COD	E		PRODUCT NAME	PRODUCT DESCRIPTION
1			SOLO_Postage_	Targeted		Postage Targeted	Solo Postage Targeted (Includes New Mover & Customer Supplied)
1			SOLO_Postage_	Saturated		Postage Saturated	Solo Postage Saturated
0 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.

QUANTITY PRODUCT CODE PRODUCT NAME PRODUCT DESCRIPTION 1 SOLO_Creative_Design_Customer_Supplied Creative Design supplied by the Customer 1 SOLO_Creative_Design Creative Design Creative Design supplied by the Customer 1 SOLO_Creative_Design Creative Design Creative Design supplied by the Customer	POSTO	CARD & LIST	POSTAGE	CREATIVE DESIGN	LIST SERVICES	SAMPLES	OTHER OPTIONS				
Image: Construction of the system of the	Cre	ative Desig	ţn								
		QUANTITY			PRODUCT COD	E		PRODUCT NAME	PROE	DUCT DESCRIPTION	
SOLO_Creative Design Creative Design Creati		1			SOLO_Creative	Design_Custor	ner_Supplied	Creative Design Customer Supplied	Creat	ive Design supplied by the Customer	
	۲	1			SOLO_Creative	Design		Creative Design	Creat	tive Design: \$125 Flat Fee, unlimited revision:	s

- 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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	-395617 Configure Products	5								Y	Cancel	Save
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	Campaign Type	B2B	•		List ID							
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POSTCA	RD & LIST POSTAGE	CREATIVE DESI	GN LIST SERVICES	SAMPLES	OTHER OPTION	٧S						
List S	Services											
	QUANTITY		PRODUCT C	ODE		PRODUCT NAME		PRO	DUCT DESCRIPTION			
۲	1		SOLO_Valpa	k_List		Valpak List		Valp	ak List Service Product			
	1		SOLO Custo	mer_Supplied_List		Customer Supplied L	list	Mail	ng List provided by Cust	omer		

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*.

Q-395617 Edit Quote Distribution Commission Clone Generate Document Add Products Quick Save Calculate Cancel V Quote Information Account Name Dunder Mitmin Frequency 12 Is e	Save 🕸 🔻 5
Account Name Dunder Mifflin Frequency 0 12	
Sales Campaign Search Campaigns	
PRODUCT NAME START QUA VOL DIST PROM PRO RATE CARD LIST UNIT PRICE ADDI PREV % CH APPR END NET T PACKA	AGE TOTAL
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Postage Life 2/2/202 USD Event 4 1 0.000 USD 0.000 0,000	0 🖬
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Solo Processing 2/2/202 USD Fee 4 1 0.000 USD 6.250 6.25	0 iii

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

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

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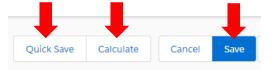
15. Select SOLO_Campaign_Setup & click Save.

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

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	Postcard 6x9 Life Event	3/15/20 24	300					0.683	USD 0.683				8		USD 204.90		0 🖬	
	Postage Life Event	3/15/20 24	300					0.372	USD 0.372				8		USD 111.60		0 🖬	
	Creative Design	3/15/20 24	1					125.000	USD 125.000				8		USD 125.00		0 🖬	
	Valpak List	3/15/20 24	1					0.000	USD 50.000						USD 0.00		0 🖬	
	Solo Processing Fee	3/15/20 24	1					0.000	USD 6.250						USD 6.25		0 🖬	
	Solo Campaign Setup	3/15/20 24	1					0.000	USD 75.000						USD 75.00		0 🖬	

- 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.

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Ň	Postcard 6x9	24 4/15/20	200	200		ent10010							USD	030/887.75	0.0	
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19. Click Submit for Approval.

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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*.

		Sandbo	x: SFTST <u>Log out</u>	
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Quick Case Create Category Operations Billing Artwork Data				
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Ad Request: Artist Direct Ad Design Additional/ Critical Change: Graphic changes including RFO before AT	P deadline (additional changes) and after ATP de	adline (critical changes)		
			I	Next

2. Fill in the required fields and click Next.

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Ex. Happy Birthday <first_name>! Ex. Happy Birthday <first_name>! Ex. Welcome to the Neighborhood <last_name> Family!</last_name></first_name></first_name>	4
* Side 1 Personalization Count	*Side 2 Personalization Count
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	* Side 2 Personalization Text 1 Welcome!
	*Side 2 Personalization Text 2
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Note personalization is not allowed on Medicare programs.	
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3. Enter in any additional information you have for the design team and click Next.

Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter Account Account Account + Follow New Task Launch Quotes Details Support Billing Dates Statement AR Sales Feed Point forget to provide the essential information: • Primay & secondary offer(s) • Specific offer disclaimers, expiration date(s), & (offer code - if applicable) • Images/visuals/mockup, etc. (attach file at next step)
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)
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)
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Q • 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

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*.

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

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