FIVE MAPLES

Development Communications

Project Management Procedure Manual

Update: 7/12/18

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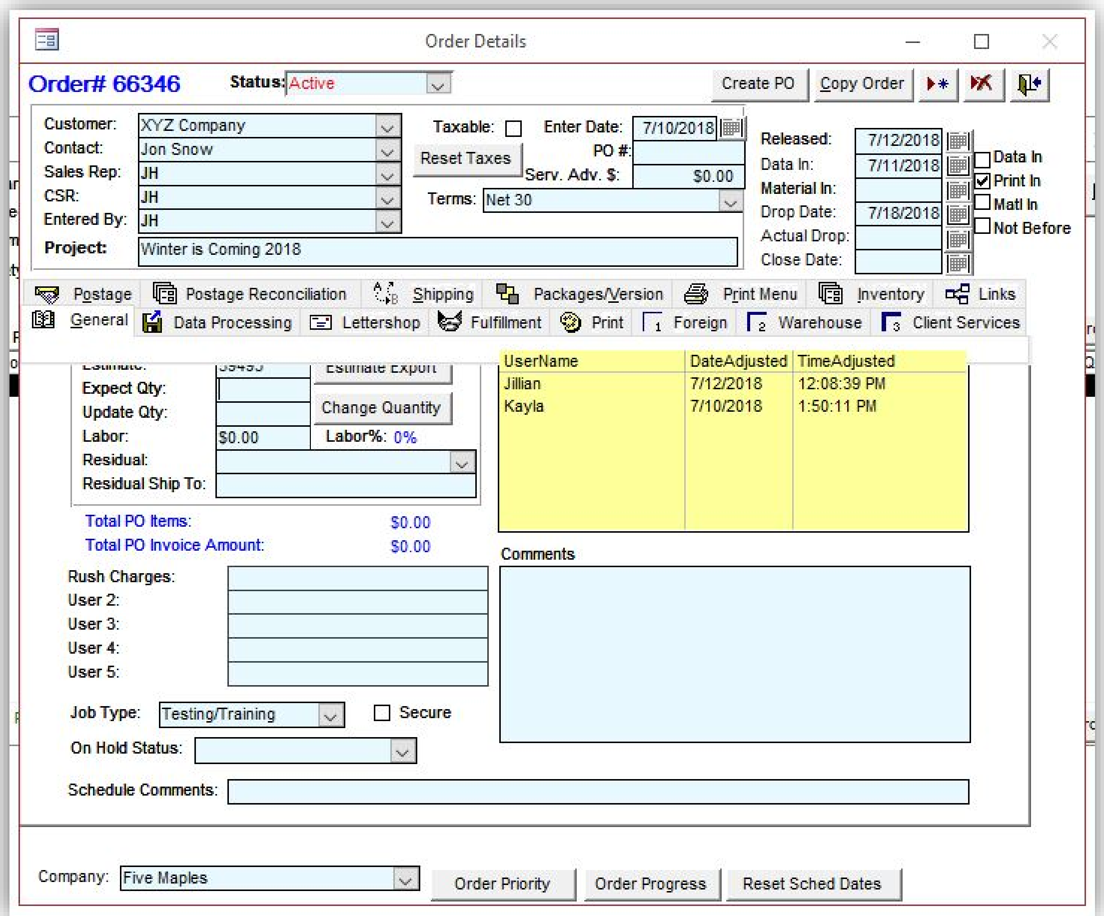


THINGS TO DO FOR THE AUTOMATED SCHEDULE

JOB TYPE

Job type indicates if a job is coming forward as client services, print, consolidated, preflight, etc. You can update this field as needed.

SECURE CHECKBOX

Secure is a checkbox that indicates if a job is secure so it can show up on the schedule as secure. You must check this if the job is secure

ON HOLD STATUS

PMs have the shared responsibility with DP for putting a job on hold. All you will need to do is change the “On Hold Status” drop down on the general tab to whichever reason fits best. See Kendra about adding a new item to the list. You can delete the text in the box when it is no longer on hold.

PRINT IN

If no Materials are being received from customer, but we are printing in-house check the PRINT IN box in the upper section of the form.

RELEASE DATE

Populate "Release Date" **with the date that a job was put forward to DP**. This date is will determine which day a job should be appearing on the schedule.

SCHEDULE COMMENTS

Enter miscellaneous comments in this field. These comments must still be written on the WO. Examples include:

- DP by 7/10
- Drop in MA
- Must mail w/ WO 66607
- Commingle
- Partnership Merge
- MUST

GENERAL TAB FIELDS

CUSTOMER

Enter the customer that the processing will be billed to (this should match the customer in QuickBooks). If several Work Orders will be invoiced on one invoice, the Account Manager puts a Post-It note on the Job Bag when it goes to invoicing ("Please Bill WO ##### and WO ##### together"). Put the Work Orders inside a big job bag.

★ See Procedure: How to Create a New Customer in MailShop

SALES REP/CSR/ENTERED BY

The sales rep and the CSR are the account manager that the customer normally belongs to. If a substitute entered the order that persons initials will be selected in the ENTERED BY field.

PROJECT NAME

Use the name the customer will recognize. For Appeals, the naming convention is [Year] [Season] [Appeal]. For example: 2019 Fall Appeal. 2021 Winter Appeal. 2025 EOY Appeal.

PO NUMBER

Required only if the customer provides one (e.g. Hadley Printing always provides a PO Number).

SERV. ADV. $ and TERMS

Not required, since terms are in Quick Books.

RELEASE DATE

Enter the date that the job will go on the schedule.

DATA IN

Enter date and/or best estimate.

MATERIAL IN

- Enter date and/or best estimate.
- If Material is here, be sure to check the Material In Box
  Make sure to physically check the Material In Box on any printed WOs (print, foreign, warehouse, etc.)
- If no Materials are being received from customer, but we are printing in-house check the PRINT IN box.

★ See Procedure: How to Receive Materials for a Work Order

DROP DATE

Enter date you want job to be completed by. Determine the Drop Date by using the Standard Turn Around Chart.

★ See Procedure: How to Determine a Drop Date with the Turn-Around Time Chart

★ See Procedure: Treatment of the Drop Date: OR BEFORE, NOT BEFORE, RUSH

ACTUAL DROP

Not used.

CLOSE DATE

The Close Date field is the date invoiced and is entered by the person closing out the invoice. However, for accounting purposes, the date on the invoice is the date of the actual mail drop, even though the invoice might be sent out some days after the drop date.

- Accounts payable should ensure that all job orders put on one invoice get a close date.
- The Close Date is useful in that it eliminates the Work Order from the Open Orders report used by Account Managers and Production for capacity planning.

QUANTITY

Enter the list quantity (or projected quantity). The actual quantity will be determined during DP processing and will be written on the work order by DP by hand.

RESIDUAL and RESIDUAL SHIP TO.

Ignore this field. Residual information is entered in the Warehouse Tab.

USERS, COMPANY, INVOICE TYPE, COMPANY.

Ignore these fields.

COMMENTS

If comments come over from an Estimate, remove them from the General Tab. Comments on other tabs are necessary and will appear only in that tab and in the warehouse tab when printed.

TAB: Data Processing

DP INFORMATION FIELDS

In the DP tab information fields (shown below) only **Weight in Ounces, Foreign Records**, **PO Drop** and **DP Status** are entered by the PM. Thickness is entered by DP. None of the other items are used.

DP In Start:		DP Out Date:		DP Out Time:		PO Drop:	01060 No
Weight In Ounces:	0	Thickness:	0	Height:	0	Width:	0
Canadian Records:		Foreign Records:		Unmailables:		DP Status:	
DP Initials:		Data Checked:		Actual Qty DP:	0	Act. $ Billed:	$0.00

Weight in Oz

Put your sample weight here. Weight is rounded to 4 digits, but extra zeros do not need to be included. Examples: 0.8/3 = 0.2667; 1.2/3=0.4; 6.1/3= 2.033.

★ See Procedure: All About Samples: How to Make One, What Kind to Make, and When

Return to AM (for Actual Sample)

When the DP work on a work order with a dummy sample is completed, or has progressed up to the *Return to AM for Actual Sample*, the work order will be returned to the Project Manager.

1. If all DP work including the presort was completed, the PM will put the job in the "Waiting for Materials" location. This location is for work orders that are complete through DP but awaiting material deliveries. When the actual materials arrive to the PM's desk, the PM:
    a. Creates an actual sample
    b. Checks all aspects of the sample, such as weight, permit, tabbing requirements, etc.
    c. Removes the dummy sample
    d. Moves the work order to the "Staged for Production" location.
2. If the presort was not completed, the PM will keep the work order until the actual sample is received. DP enters Hold in the first column on the Production Schedule. The PM changes the "DP Status" in Mailshop to "Hold". When the actual materials arrive to the PM's desk, the PM:
    a. Creates an actual sample
    b. Measures and writes in the weight on the work order
    c. Checks all other aspects of the sample, such as permit, tabbing requirements, etc.
    d. Inserts the receiving ticket, warehouse samples and job sample into the work order
    e. Removes the sample dummy
    f. Walks the work order into DP for final DP processing

When does the PM use the Return to AM for Actual Sample instruction?

1. When the data work is complete, but a presort cannot be done because we don't have an actual sample or accurate dummy
2. When the data work is complete, (and a presort can be done based on an accurate dummy), but the PM still wants to make up a live sample for other reasons, for example to be

completely clear about hand room work or inserting instructions or to illustrate the correct inventory pieces.

Foreign Records

- Pick either Canadian Only, Do Not Mail, or Mail All

★ See Section: TAB: Foreign

PO Drop

- Pick the zip code of the post office where the permit is held. In other words, ask yourself what post office will audit the mailing, and enter that post office.
- An audit at Five Maples is PO Drop 05346. Most audits are done in-house at Five Maples.

Things to note:

- An audit at Five Maples with subsequent delivery to an SCF location, for example, is called a "drop shipment." For this you enter **05346** because it is 'entered' at Five Maples (=Putney).
- Most post office locations have a "business mail entry" function. In other words, they accept presorted mailings. In a few cases, the business mail entry is in a different location. For example, the Lebanon, NH post office business mail entry is at the Lebanon Postal Annex – a different location. Many post offices have specific hours for business mail entry, and a specific clerk who does this. (When is an appointment via Postal One required? For example, not required in Keene).
- For example, some clients have permits at the Springfield NDC under zip code 01152. When DP enters 01152 into Mail Manager, the mail is delivered to and the customer automatically receives an NDC discount (assuming the mailing qualifies). We also have Springfield, MA zip code 01101 in MailShop, but that is a downtown post office, not the NDC location.
- SCF and NDC locations have BME (business mail entry), SCF and NDC drop shipment counters.

DP SERVICE CODES

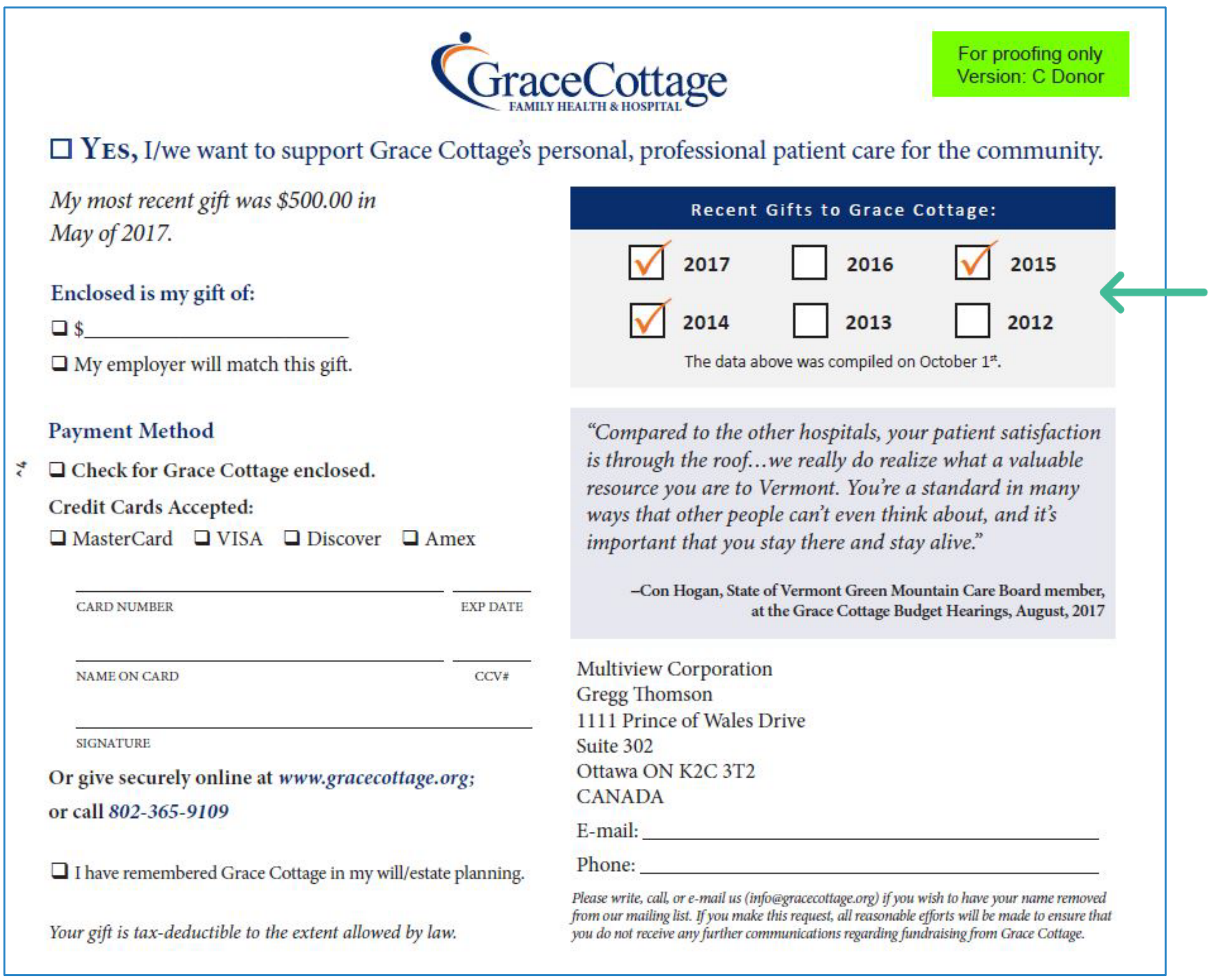
>Security

This code is used at the beginning of all WO sections to let all departments know that the data file is considered "secure." The file could contain NPI (Non-Public Personal Information) such as credit card institution. OR the file could contain PHI (Protected Health Information). Clients who typically require Security Policy: Hospitals and Banks. Note: Any client can request for a mailing to be secure.
Learn more about the Five Maples Security Policy: L:\FIVEMAPLES\Data Security\Security Policy

We use Hightail to share/send/receive secure files with clients.

AskCheck

Use this code when Annual Giving Checkmarks are used on a reply form. An Annual Giving Checkmark it exactly that: it tells the donor which years they gave.


GraceCottage
FAMILY HEALTH & HOSPITAL

For proofing only
Version: C Donor

☐ YES, I/we want to support Grace Cottage's personal, professional patient care for the community.

My most recent gift was $500.00 in May of 2017.

Enclosed is my gift of:
❑ $________________________
❑ My employer will match this gift.

Payment Method
❑ Check for Grace Cottage enclosed.
Credit Cards Accepted:
❑ MasterCard ❑ VISA ❑ Discover ❑ Amex

CARD NUMBER EXP DATE

NAME ON CARD CCV#

SIGNATURE

Or give securely online at *www.gracecottage.org*; or call *802-365-9109*

❑ I have remembered Grace Cottage in my will/estate planning.

Your gift is tax-deductible to the extent allowed by law.

Recent Gifts to Grace Cottage:

☑ 2017	☐ 2016	☑ 2015
☑ 2014	☐ 2013	☐ 2012

The data above was compiled on October 1st.

"Compared to the other hospitals, your patient satisfaction is through the roof…we really do realize what a valuable resource you are to Vermont. You're a standard in many ways that other people can't even think about, and it's important that you stay there and stay alive."

–Con Hogan, State of Vermont Green Mountain Care Board member, at the Grace Cottage Budget Hearings, August, 2017

Multiview Corporation
Gregg Thomson
1111 Prince of Wales Drive
Suite 302
Ottawa ON K2C 3T2
CANADA

E-mail: ______________________
Phone: ______________________

Please write, call, or e-mail us (info@gracecottage.org) if you wish to have your name removed from our mailing list. If you make this request, all reasonable efforts will be made to ensure that you do not receive any further communications regarding fundraising from Grace Cottage.

CODE ASK STRINGS OPTIONS

Ask String Codes tell DP how to format the ASK STRINGS and LAST GIFT AMOUNTS for a reply form. Such as: $X,XXX.XX comma, with decimals; $X,XXX comma, no decimals; or Other __________.

- ASKGENERIC - This code is used to create Ask Strings using a "generic" or standard set of strings (i.e., everyone gets $100, $50, $25, other).
- ASKSTANDARD - This code is used to create Ask Strings using the Five Maples Standard Ask String Table. Below is a portion of the Five Maples Standard Table.

Last Gift Amount			Ask String		
From		To	Ask1	Ask2	Ask3
$0.00	—	$0.99	$100	$50	$25
$1.00	—	$10.00	$50	$25	$10
$10.01	—	$15.00	$50	$25	$15
$15.01	—	$20.00	$50	$25	$20
$20.01	—	$25.00	$100	$50	$25
$25.01	—	$30.00	$100	$50	$30
$30.01	—	$35.00	$100	$50	$35
$35.01	—	$40.00	$100	$50	$40
$40.01	—	$50.00	$150	$100	$50
$50.01	—	$60.00	$150	$100	$60
$60.01	—	$75.00	$150	$100	$75
$75.01	—	$100.00	$150	$125	$100
$100.01	—	$125.00	$200	$150	$125
$125.01	—	$150.00	$250	$200	$150

- ASKTABLE - This code is used to create customized Ask Strings per the client's instructions (i.e., Donors who gave $500+ will get "THIS ASK STRING." Donors who donated to a special event will get "THIS ASK STRING.")

★ Learn more about Ask Strings on the Five Maples Blog.

EDIT

Use this code to ask DP to make changes to the original data file PRIOR to importing the list into Mail Manager. Changes could be anything from "remove all references of (ret.)" or individual data changes ($Jillian Hobday - Please remove $ from this record). You can also use "Edit Original Data File" to add/delete/edit records.

SALUTATION

This code is used to tell DP to create a Salutation field in the original data file. You can change the MS Description to read "Review Salutation" and ask DP to review the data file's Salutation Field for mistakes such as duplicate names, missing first names, names starting with "and." (Example of Salutations for Review: 'and Jillian' 'John John Williams' 'Mr. and Smith')

CODE

This code is used to tell DP to include a Code that is present in the Original Data File; add a Code that needs to be included for the mailing; edit a Code in the Original data file; or check for Leading Zeros in the Original Data File. A code could be anything from the Appeal Code, Constituent ID, Class Year, etc.

SEED

A "seed" is an address or extra set of addresses that are added to a mailing. Think of them as secret or planted names to see how the mail piece performed. A client could include themselves as a seed to see how quickly the mail arrived at their home. Or you can include yourself as a seed to see how the final mail piece looked after going through USPS. Include any variable information used in the package, as well as the addressing information, letter/reply versions, gift information, etc. for DP when including a SEED.

SLUG

"Slug" means to add or include. This code can be used to tell DP to add in a code such as the Appeal Code. Or we can ask DP to slug in "The Family of" in front of the addressee field. Or slug in "Development Manager" above all addressee fields.

FILE

This code is used to tell DP which list(s) to use for the mailing AND what to look out for when loading the file (i.e., mixed cases, soft returns, multiple addressing fields, which fields to load, etc.) You must review the file to give DP directions about the file.

★ See Procedure: Things to Look for When Reviewing a Data File

MASTER

This code is used to tell DP to either update the client's Master Suppression File or Create a Master Suppression File. A Suppression File is a list of records that a client does not want to solicit.

CASS & DPV

- All WOs must be get the CASS code (unless it is a saturation mailing).
- The USPS requires that all jobs are checked to their database, the Coding Accuracy Support System, or CASS. When you CASS a list the process will verify or update the zip+4 and delivery point code.
- There are two options for CASSing addresses: Okay to standardize or DO NOT STANDARDIZE. Unless specified, it is **OK to standardize**. Clients who typically do not like the standardization are universities and other higher education institutions.

NCOA OPTIONS

National Change of Address (NCOA) is a service offered by the United States Postal Service. It will compare the addresses in your list to its own database to determine if the addressee has filed a change of address form. The NCOA will update any such records, as well as also flag any undeliverable records. An NCOA is required to obtain bulk mail rates.

>Movecomply

An NCOA does not have the performed on a list IF:

1. NCOA has been completed on the list within 95 days prior to the mailing date for the current mailing (could have been done on a previous mailing if same list is used; have been done by a customer; or they purchased a list and has a certificate)
2. It has an Ancillary Service Endorsement. The following requirements must be met:
    a. This list was mailed by the customer within the last 95 days; or the names in this list were in a list that was mailed by the customer within the last 95 days.
    b. AND, the mailing included one of these endorsements: Address Service Requested, Return Service Requested, and Change Service Requested. (Forwarding Service does not qualify).
    c. AND, the customer has updated the list with the returns from last mailing.

   Publishers and billing services are often using this. Some of our customers use both NCOA and an endorsement, to double cover any changes, since NCOA isn't perfect or may be several weeks out of date by the time the mailing arrives at the local post office.
3. Alternate - Records are new from Addressee. Use when the customer has collected the names within the last 95 days from customers (e.g., internet purchases, school registrations, attendance at special event, hospital grateful patient mailing, etc.)
4. Alternate - Alternate Address Formats. Use when the address panel includes Postal Customer, Current Resident, or other wording indicating all pieces will be delivered.
5. The mailing is Single Piece Rate and does not require NCOA; or it is a type of saturation mailing

>MoveComply Codes not used: Address Change Service, FASTForward, Alternate – NSCS Approved, Multiple.

NCOA-RET

- This code tells DP that you'd like an NCOA done on the list and that the NCOA results **should be returned** to the client.
- You must indicate whether a PAF (Processing Acknowledgement Form) has been completed by the client and is either active or included in the job bag.
    - **A PAF is required to run the client's list through the NCOA database. PAFs are good for 1 year.**
- You must include expiration date of the PAF, whether the file includes secure information, and WHO should get the NCOA records if different from "contact" on the WO.

NCOA-SET

- This code tells DP that you'd like an NCOA done on the list, but the file **does not** need to be returned to the client.
- You must indicate whether a PAF (Processing Acknowledgement Form) has been completed by the client and is either active or included in the job bag.
- You must include expiration date of the PAF, whether the file includes secure information, and WHO should get the NCOA records.

NCOA

This is the number of addresses run through the NCOA database.

DEDUPE

In some mailings, particularly ones that use multiple lists, names and addresses may appear more than once. The DEDUPE code allows us to remove matching records through the methods below:

1 File, **Exact**, no instructions	ensures that only 1 piece of mail is received by each unique person at an address
1 File, **Household**, no instructions	ensures that only 1 piece of mail is received by each family at an address
1 File, **Aggressive Household**	Same as **Household**, but more aggressive. DP will remove any questionable records that seem like duplicates.
1 File, **Aggressive Exact**	Same as **Exact**, but more aggressive. DP will remove any questionable records that seem like duplicates.
1 File, Other (Please Specify):	Name the method and include instructions
Multiple Files	Make sure to include a priority for the suppression (i.e., List DOG is more important than List CAT --- this means that records in list DOG take precedence over records in list CAT).
Household Radical *(not MS option)*	ensures that only 1 piece of mail is delivered to each address.

SELECT

This code is used to DP to select records from the current list and sublist those records to another work order. DP will automatically remove this records from the current list. IF YOU NEED TO RETAIN THESE RECORDS, make sure to include this information.

PRESORT

Postal Presort means grouping by ZIP code. Five Maples prepares, sorts, addresses and prepares postal paperwork to get a bulk rate discount. Unless the job is Single Piece Rate, you will always select the PRESORT code. You will almost always select "with TRACK & TRACE." Track & Trace is a service that allows us to track all pieces of mail.

SORT

Use either “PRESORT” or “SORT,” never both. If a mailing is being returned to client (RTC) and the client would like to receive the materials back in a certain order, use this code. Indicate in the details box how the mailing is to be sorted.

Ex: Alpha by last name, in original list order, Alpha by last name, separated by Package Code.

>OUTPUT

This code tells DP whether or not to export the OEL, T&P, SEQ #, & BC to lettershop for addressing. Whatever you select here MUST match your selection in the Lettershop Addressing section and your SAMPLE.

- OEL = Optional Endorsement Line; Required for flats; Not recommended for appeal mailings due to aesthetics, but commonly appears on booklets, folded self-mailers, postcards, etc.
- T&P = Tray & Pack; Required for all PRESORTED mailings; not required for Single Piece Rate
- BC (Barcode) = Barcode appears above the address block, unless there is direction to offset. On smaller envelopes (#10s, 6x9), barcode is usually offset.
- Seq # = Also known as the presort sequence number; used for 100% record matching accuracy (i.e., matching the envelope address to letter salutation)

SETUP: (VARIABLE PRINTING)

Variable printing is a form of printing in which elements such as text and/or graphics may be changed from one printed piece to the next. This is how we are able to personalize letters to individual donors. We have multiple options for variable printing, also called a mail merge, but the most common is the Letter and Reply.

★ See Procedure: What to include in the job bag for a merge job

SETUP: Mail Merge

1. First select the # of versions
2. Select an option for Matching
    a. Seq # on Lake System (Five Maples Machine Matching System)
    b. Seq # in hand room
    c. No Match Required
    d. Client will perform match
    e. Other
3. Include any direction about which letter version to use, merge fields, ask amounts in letter, etc.

SETUP: 8.5 x 14 with Tear Off Reply

1. First select the # of versions
2. Select an option for Matching - likely NO match required because most 8.5 x 14 go into a #10 windowed envelope and does not require a match to the letter and envelope
3. Include any direction about which letter version to use, merge fields, ask amounts in letter, etc.

SETUP: Deceased Screening

Include any information needed such: remove deceased records from mailing --- do not solicit!

SETUP: Label

Include any label information such as size, design file location, indicia information, return address, etc.

PROOF

There is a fee for additional variable proofs. DP usually provides a proof of the longest name field, an obscure record, or a few variations of merge fields. If a client asks up front for a proof of each variation, then we would charge for additional proofs.

PS

PS Stands for Printing Labels.

1. Choose Laser Printed
2. Select the best size
3. Describe: design file location, indicia information (if needed), return address, etc.

MERGEBLACK and MERGECOLOR

This code tells DP the specs of the variable document (letter, reply, etc.) you want to print in BLACK ink or in COLOR, such as:

1. What is the size of the document? (8.5 x 11 letter, 3.5 x 8.5 reply, etc.)
2. Does the document have bleeds? (Bleeds means that ink coverage extends beyond the edge of the final trim size)
3. What are the color specs?
    - K/0 = black on front/nothing on back
    - K/K = black on front/black on back
    - 4/0 = Full color on front/nothing on back
    - 4/2 = Full color on front/2 colors on back (blue and black for instance)
    - 2/2 = 2 colors on front/2 colors on back
4. Color matching?
    - No color matching for black only
    - Color matching is not required
    - If client has provided specific logo or branding colors, include them here (ex: PMS 123)
5. Who will sign off on press proofs? PM or Print Department?
    - This depends. If picky client color match, then PM should sign off. If changes to doc, PM should sign off to make sure correct doc is being used. If nothing special and easy job, PRINT can sign off.
6. Are we using Five Maples paper stock or client stock?
    - For Letter: Number one choice of Five Maples Stock is 70# Finch Digital Opaque
    - For reply CARD: 80# accent opaque
    - For Reply FORM: match letter stock
7. How are we proofing this document?
    - Are we sending a PDF Proof to the client?
    - Internal proof?
    - Hardcopy proof to client?

- Typically we send a PDF proof to the client after we complete third party proofing

★ See Procedure: What is Third Party Proofing?

LIVE

Direction to DP and Lettershop to create an actual sample of the mailing (i.e., letter, reply card, inside of #10 envelope) to be returned to the client. These can either be addressed with a standard address such as "John Doe, 123 Giving Lane" or not addressed.

TAB: Lettershop

FONT

This code indicates that the font being used for ink jetting the address is not one of our standard or handwriting font selections. Please indicate the font type to use.

SPECIAL

This code is used to give Special Direction for Lettershop. Use this to ensure that lettershop is aware of any out of the ordinary instructions for any of the lettershop service codes.

SETMESSAGE

This code indicates to Lettershop that a message will be ink jetted on the piece/envelope.

MESSAGE

Use this code if you want a message printed on the outside of the envelope. Select black or color, and indicate color (if needed). In the Details box is where you will type the message to be ink jetted, and indicate size, font and placement. A PDF proof must always be shown to the PM and then the client to ensure accuracy.

ENDORSE

Use this code if you need to add an Ancillary Service Endorsement to a pre-printed piece or envelope. ASEs provide details back to the sender regarding why the post office was unable to deliver an individual piece. Undeliverable mail that is NOT sent First Class will be destroyed by the PO unless it bears an ASE.

SETRETURN

Indicates that the piece or envelope will need to have a return address ink jetted on it.

RETURN

Type the return address to be ink jetted in the details box. Please indicate font and size.

SETPERMIT

Indicates that the piece or envelope will need to have a PERMIT (aka Indicia) printed on it. If a piece/envelope is not being mailed with a stamp, it must have a permit/indicia printed on it.

★ See: What is a Permit/Indicia

PERMIT

Add or Correct a permit by providing the appropriate permit verbiage. Permit must match the mail class under which the piece is mailing. Typically, there are 3 types of permits you will use- Presort standard, presort nonprofit, and first class. Lettershop will default to a certain font and size unless otherwise indicated.

SETADDRESS

There are 9 options for addressing:

- Choose which type of envelope or mail piece you are ink jetting, based on DMM specs/shape/size of piece.
- You MUST indicate inclusion/placement of barcodes, Optional Endorsement lines, Tray & Pack information, and sequence numbers. It must match what is in >Output to X.
- If addressing with Handwriting Font on any piece, please select "With Handwriting Font."
- Select an option for proofing. PDF proof to client if they would like to double check (codes, special fonts, etc.). Physical Proof is very rare. Internal Proof if you would like to look over the addressing yourself to ensure accuracy. Or No Proof Needed.

ADDENVELOPE

Indicate envelope size, standard or handwriting font, color, size, barcode, OEL, T&P, Seq # info.

ADDBKLT

Indicate type of booklet, how many tabs it will receive, size and placement of tabs, then specific addressing, barcode, OEL placement, T&P, Seq # (as in Address Envelope)

ADDENVSTD

Reduced price service which inkjets a lower quality address. Address Block barcode only

ADDFLAT

Indicate the weight range of the piece, then specific addressing, barcode, OEL placement, T&P, Seq # (as in Address Envelope)

ADDFSM

Indicate the weight and fold of the FSM, type and position of tabbing, then specific addressing, barcode, OEL placement, T&P, Seq # (as in Address Envelope)

ADDOSPC

Indicate specific addressing, barcode, OEL placement, T&P, Seq # (as in Address Envelope)

ADDPC

Indicate specific addressing, barcode, OEL placement, T&P, Seq # (as in Address Envelope)

ADDRESPONSE

This code is used to inkjet (200 or 300 DPI) reply cards or buckslips in any type of envelope.

STAMP

Advises lettershop of what type of stamp to apply. Stamp type MUST MATCH postage type at top of work order.

SETTABONLY

Indicate # of "Passes." Tabs that are on the top edge ONLY are one pass. A combo of top and leading tabs are 2 passes. A combo of leading and trailing tabs requires 3 passes.

★ See Procedure: How to Tab a Self-Mailer

★ See Procedure: How to Tab a Booklet

TABONLY

Use this code to indicate specific placement of tabs after determining # of passes

SETMATCH

This code indicates that the Lake System will need to be used to match multiple variable pieces before machine inserting them. It will read the Sequence # that has been printed on each of the variable items to ensure the pieces match. You will select how many pieces are to be matched and what they are, and what type of envelope into which they will be inserted.

For example: A variable letter, a variable reply and the outer envelope will all be matched (3 ways) and then inserted into the #10 outer envelope.

3-way match: Outer Envelope, Letter, & Reply, inserted into #10 Envelope

MATCH

This code will reiterate the # of matches required, AND the number of inserts, into which envelope. For example, the letter, reply card and the outer envelope all match by recipient.

You must show the pieces in the correct order in the "Comments" section. This must also match the order of your sample.

1. Variable Letter
2. Variable Reply
3. #9 Envelope
4. Into #10 Envelope

SETINSERT

Use this code to indicate that you will require machine inserting of static piece(s).

INSERT

Indicates Envelope type and number of inserts

You must show the pieces in the correct order in the "Comments" section. This must also match the order of your sample.

1. Static Letter
2. Static Rack Card
3. Into #10 Envelope

TAB: Print

PREPRESS

Use this code to indicate modifications that need to be made to a static document before printing (Ex: add indicia)

★ See Procedure: What Qualifies as a Prepress Service?

PROOF

Use this code to indicate that you need Hardcopy Proofs sent to the client overnight. The Print Department will print physicals and forward to the Warehouse.

★ See Procedure: Proofing

PRINT

- NOTE: The PRINT code is used for static printing only (non-merge printing).
- Much like the MERGEBLACK and MERGECOLOR codes, this code has wizards so you can indicate what type of item you are printing, the size, colors, bleeds, paper stock, etc. If the size or type of item is not available in the wizard, you can select any size and correct it in the Description box after. Also include the file name of the document that is to be printed.
- There are two options for printing:
  - **Print IN**. Used on the work order to indicate that Five Maples will do the work internally.
  - **Print OUT**. Used on the work order to indicate that the Account Manager will subcontract the work to a printer.
- Again, like MERGEBLACK and MERGECOLOR, the following format is used to specify printing:
  - Printin: Donor Impact Report, 8.5” x 11”, 4/4, with bleeds, Five Maples Stock, 70# Finch Digital Opaque, pdf proof to client
  - Printin: Envelope, #10 regular, K/0, 24# white wove, internal proof approval by AM
  - PRINTOUT: (copy specs from purchase order)
- BILLING: At time of billing, the terms Printin and Printout are converted to the simple term Print. We don’t indicate on invoices whether we printed inside or out.

★ See Procedure: How to Price Five Maples Printing Using the Print Pricing Estimator

CUT

Use this code if the client provides preprinted shells or stock (Ex: Reply Cards printed 6 up on larger paper)

>Forward

Use this code if there are no additional production steps needed after printing/folding except shipment or pickup from the warehouse. Ex: Many Return to Client segments contain letters that will not be inserted into envelopes, but sent back to the client separately.

>Security

Unlike other sections, the Security code goes at the end of the print section because confidential materials are only present after they are printed.

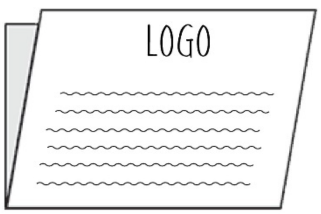
REPAIR

If damage occurs during printing or folding, the pieces will be reprinted

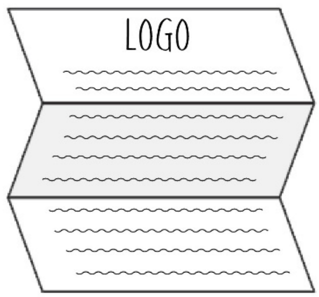
★ See Procedure: When to use the Repair All Service Code

SETFOLD & FOLD

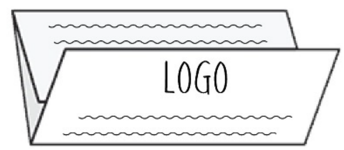
Use this code to indicate that there are pieces to be folded. The wizard offers you the most common folding options. Select the option with "Keep Sort Order" if the pieces have been presorted or sorted a certain way for return to client.



BI-FOLD



Z-FOLD (ACCORDIAN)



LETTER FOLD OUT

MOST USED

TAB: Foreign

Please refer to "Service Codes in Order" doc for correct order of codes when processing foreign same as domestic or differently from domestic.

Note: Canadian records are treated separately from other Foreign records when it comes to postage.

SETFOR

Set Up Foreign. Always used regardless of quantity or how foreign is being processed.

>Same

Process Same As Domestic. Use for mailings that are already being inserted into envelopes, addressed postcards, or packaged in boxes with labels where the only difference between the foreign and domestic will be postage type. Use only **>Same** or **PROCESS** code after Set Up Foreign. Never use both.

PROCESS

Process Foreign. Use for items like folded self-mailers, flats, catalogs, etc. that are NOT placed into envelopes for the domestic portion of the mailing but would need to be placed into an envelope to mail foreign. Use only **>Same** or **PROCESS** code after Set Up Foreign. Never use both.

ADD

- This code indicates that envelopes are needed.
- Specify what size envelope the piece should go in and how to address them. The wizard provides options for commonly used envelopes. Then it provides options for addressing. The most common choices are "Inkjet" or "1 up P/S labels." All foreign mailings need a return address.
- **NOTE:** Even if the customer is supplying envelopes use this code and indicate client stock in the details box after completing the wizard.

PROOF

This code indicates that a Foreign Addressing Proof is requested by either you or your client.

The remaining codes refer to the type of foreign postage. Choose one per type of Foreign:

CANADA

and/or

FOREIGN

- Use ISAL when the domestic portion of the mailing is going out presort standard/presort nonprofit standard class (unless client instructs otherwise).
- IPA is a First-Class Consolidator option when the mailing has a large quantity of foreign (and it would be very time consuming to hand apply First Class Foreign Stamps).
    - Send a breakdown of all the foreign countries and quantities of each to Consolidator contact (Clem) and request a quote for mailing via IPA. It can be cost effective for larger foreign mailings, and treated as a priority service class
- Use "USPS Stamp $1.15- 1 oz or less" to indicate use of a Foreign First Class SPR stamp (Canada and other Foreign) when the domestic portion of the mailing is going out First Class.
- Use "USPS over 1oz- METER" or "USPS under 1oz- METER" when the postage is being metered.
    - These options should be used for quantities greater than 200 that you'd like to go First Class

METERFOREIGN

When you have selected meter as your option in Mail Foreign or Mail Canada, you must also select this code. Metering is a billable charge and therefore has its own service code.

Meter rates are based on weight and price groups determined by the PO based on the country of destination.

- When possible (All foreign pieces to the same country), you should provide the meter rate in the details box after completing the wizard.
- If there are many countries in different price groups, you can request a Distribution Report by country from DP, or provide Production with an Excel spreadsheet. Production has a meter rate chart for reference.

STAMPFOREIGN

When you have selected USPS Stamp as your option in Mail Foreign or Mail Canada, you must also select this code. Applying stamps is a billable charge and therefore has its own service code.

TAB: Warehouse

>Contact Cust

- Use the wizards to choose from various options as to why we'd need to contact a customer upon completion of a job.
- Include contact name and phone and/or email address in the "Comments" section.
- If client is picking up materials, please be specific about WHAT materials they are picking up
    - EX: 900 inserted, addressed, stamped, unsealed envelopes AND 900 folded letters, in sort order).
    - Note: It is best to know the disposition of remaining inventory prior to putting the job forward.

>Count

If residuals are being returned to inventory, sometimes a client will like to know exactly how many pieces remain. Please provide contact information for the client in the comments section.

>Recycle

This option is best when quantity of residuals is small or the client does not need them back in house (Ex: A dated folded self-mailer, or shrink quantity for envelopes printed in). Unless we are stocking inventory for a client or returning residuals, you should always recycle residuals.

>Warehouse

Use this code when residuals will not be mailed or recycled, but used again for a future mailing. (Note: this does not apply to shrink quantity print in materials)

DELIVER

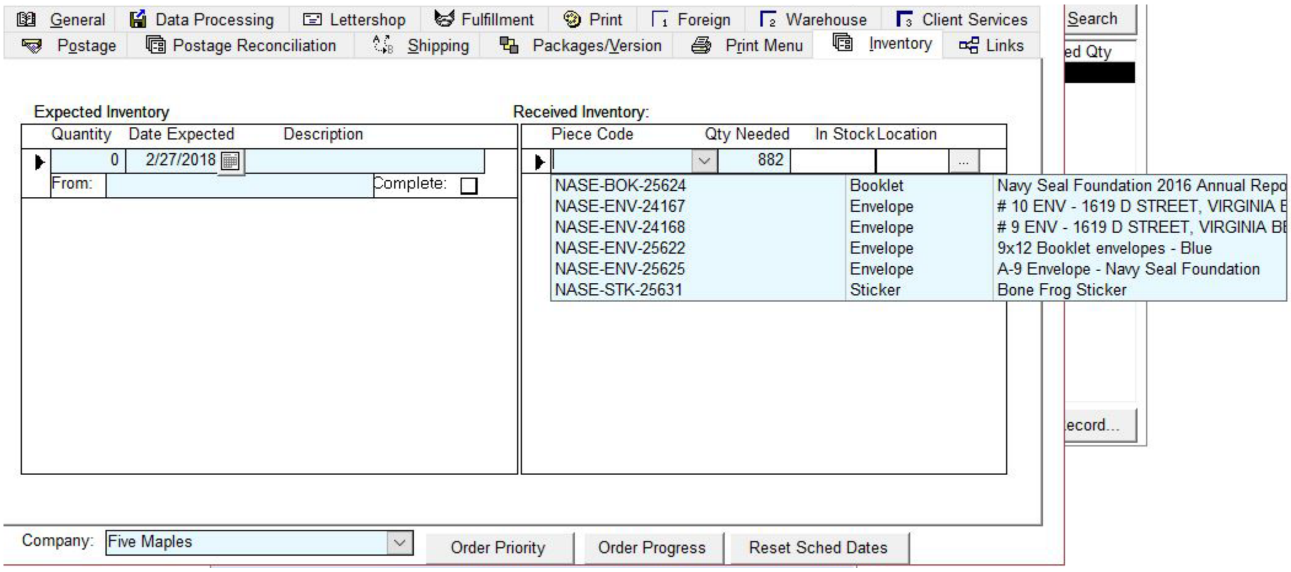
- If “Take NDC/SCF” option is indicated on the work order, this code should always be used followed by the wizard options "NDC/SCF" (For example: DELIVER TO NDC/SCF). This indicate to the warehouse that arrangements need to be made to deliver mail to one of these centers.
- DELIVER can also mean that the mailing needs to be delivered to a specific post office. You must provide this information in the comments section.
- DELIVER can also mean that the mailing needs to be delivered to the client. Client delivery information and preferred method of shipment must be provided in the comments section.

SHIP

Use this code if client would like residual materials or return to client materials sent back to them.

- Use the Wizard to choose one of the common shipment options.
- Then be specific about WHAT materials are to be shipped. List the items that need to be shipped. (See example above in "Contact Customer")

TAB: Inventory



What is inventory?

Client materials typically become inventory in two ways:

1. Materials are either received from the client or an outside vendor (such as an outside printer) and entered as inventory by the Warehouse Manager
2. Or we process residuals as "inventory" if it will be used on multiple jobs
   a. For example: the materials listed above are used regularly on Navy Seals jobs, therefore they are stored in our Warehouse as inventory with Piece Codes.

Allocating Inventory

- If you have inventory in the warehouse:
  1. Navigate to the "Received Inventory" Section
  2. Use the "Piece Code" drop down to find the materials you need for the job
  3. Update the Quantity needed
- If you have received materials for a work order, the Warehouse Manager will deliver 3 samples to your Samples Pile at your work station. It is your job to Allocate these materials using the Process: How to Receive Materials

Things to check for on the inventory tab:

- **COPY ORDER:** It is very important to check the inventory tab when Copy Ordering. Double check the Piece Codes and Quantities, and delete any inventory that is not needed.
- If you do not have enough inventory, contact the customer about what they want to do (will they send more? Should we PRINT IN what is needed to complete the mailing?)

TAB: Postage

SORT

Gives direction to Data Processing on how to handle the list; not necessarily how to "sort" the mailing.

Auto ONLY

- Only mail automation qualified pieces.
- Not typically used.
- A price category for mail that is presorted and pre-barcoded and that meets addressing, readability, and other requirements for mail that can be processed on automated equipment.
- Automation prices are generally lower than prices for single-piece mail or nonautomation presorted mail.

To qualify for automation prices, your letters and cards must meet very specific criteria, including:

- A minimum number of pieces (200 for USPS Marketing Mail, 500 for First-Class Mail).
- An Intelligent Mail barcode encoded with the correct delivery point routing code on each piece in the address block or in the barcode clear zone.
- An address list that has been checked and CASS-certified within the last 180 days and receives a ZIP+4 code or numeric equivalent to the delivery point barcode (DPBC).
- No more than 3.5 ounces for USPS Marketing Mail and USPS Marketing Mail Carrier Route.
- No polywrap, polybag, shrinkwrap, clasps, strings, buttons, or similar closure devices.
- Automation letter or flat-size mail is mail that is 100% barcoded using an Intelligent Mail barcode (IMb) encoded with the correct delivery point routing code and prepared for the Postal Service's high-speed mail processing equipment. The Postal Service saves the cost of more labor-intensive sortation and shares the savings with you in the form of lower postage prices.
- Automation prices are available for letters, postcards, flats (large envelopes), and parcels.

Auto/ Non-Auto

- Mail both automation and non-automation qualified pieces.
- This is commonly used.

Barcoded

- Mail for barcoded rates.
- Used with flats and parcels.
- A postage discount for certain machinable Package Services mail products that bear a correct barcode and generally meet other size, shape, and volume requirements.

CR-RT

- Mail for carrier route rates.
- Mail pieces do not have addressees; or they use "Postal Customer" etc.
- In common usage, carrier route includes city routes, rural routes, highway contract routes, Post Office Box sections, and general delivery units.

- A presort level in which all pieces in the bundle or container are addressed for delivery to the same city route, rural route, highway contract route, Post Office Box section, or general delivery unit. A price category available for some mail classes or products prepared at a carrier route presort level.

To qualify for carrier route prices, you must sort your mailpieces to the individual carrier routes within a 5-digit ZIP Code. All pieces must:

- Meet all the basic requirements for USPS Marketing Mail.
- Be part of a single mailing of at least 200 pieces or 50 pounds of carrier route mail.
- Be properly sorted to carrier routes and sequenced.
- Bear a delivery address that includes the correct ZIP Code or ZIP+4 Code.
- The addresses must meet high quality standards.
- Be automation-compatible and bear a delivery-point barcode for some prices.

Machinable

- Mail for machinable rates.
- If you prepare your letters and cards so that they have an accurate address and can be processed on Postal Service equipment, your mail is "machinable" and eligible for "presort" prices.
- Machinable mailpieces must meet specific standards, including size, shape, and weight.

Nonmachinable

- Mail at nonmachinable rates.
- Nonmachinable means the incapacity of a mailpiece to be sorted on mail processing equipment because of size, shape, content, or address legibility.
- Such mail must be processed manually and may be subject to a surcharge or higher price.

Saturation

- Mail for saturation rates.
- Mail pieces have addresses.
- A carrier route price for Standard Mail and Periodicals letters and flats that requires preparing the mail in walk sequence, with mail to 90% or more of the active residential addresses or 75% or more of the total number of active possible delivery addresses per route receiving this mail.

Single Piece Rate

- Mail at single piece rate.
- Single Piece Rate is a postage price available for individual First-Class Mail, Priority Mail, Priority Mail Express, Standard Post, Bound Printed Matter, Media Mail, and Library Mail pieces.
- SPR is not available for Standard Mail or Periodicals pieces.
- This type of price contrasts with prices available for bulk mail and presorted mail that require a minimum number of pieces and must meet other requirements such as sortation to qualify for the lower prices.

- Single-piece prices are available to the general public and to commercial mailers and require no special sortation.

GEO

DDU

- A Standard Mail discount for pieces properly prepared and entered by the mailer at the delivery unit that serves the delivery address on the pieces. The mailer receives the discount because of the reduction in USPS transportation and distribution costs.
- Periodicals, Parcel Select, and Bound Printed Matter prices for pieces properly prepared and entered by the mailer at the delivery unit that serves the delivery address on the pieces. The mailer receives the lower price because of the reduction in USPS transportation and distribution costs.
- The delivery unit or other postal facility designated by USPS as a delivery unit where a mailer enters mail destined for addresses served by the carriers of the unit. Mail entered correctly at a DDU may be eligible for a DDU discount or price.

DO NOT TAKE: Advises DP to not take any discount, whether eligible or not.

FC N/A: Mailing is first class and ineligible for the discount.

NDC- CLIENT

- A price available for Standard Mail parcels and Parcel Select pieces prepared as specified, sorted to network distribution centers or auxiliary service facilities, and entered by the mailer at a business mail entry unit or at a facility other than a network distribution center. We take discount and pass savings along to client.
- A highly mechanized and automated mail processing facility formerly designated as a bulk mail center. NDCs are classified as Tier 1, Tier 2, or Tier 3 sites. Tier 1 sites handle the distribution of local (turnaround) and destination Standard Mail, Periodicals, and Package Services pieces. Tier 2 sites have Tier 1 responsibilities and handle the distribution of Standard Mail, Periodicals, and Package Services pieces locally and to the network. They also handle surface transfer center containerization and dispatch operations of outgoing and incoming Priority Mail, First-Class Mail, Periodicals, and Standard Mail pieces. Tier 3 sites have Tier 1 and Tier 2 responsibilities and serve as consolidation points for less than truckload volumes from Tier 2 sites.

NDC- FM

- A price available for Standard Mail parcels and Parcel Select pieces prepared as specified, sorted to network distribution centers or auxiliary service facilities, and entered by the mailer at a business mail entry unit or at a facility other than a network distribution center.
- We take discount and keep savings. Client charged full postage price.

NDC-MUST: Direction to DP that an NDC discount MUST be taken.

NDC/SCF OK- CLIENT: Direction to DP that an NDC/SCF discount is okay to take if it will be profitable. Savings passed along to client.

NDC/SCF OK- FM: Direction to DP that an NDC/SCF discount is okay to take if it will be profitable. Savings kept by FM and client charged full price for postage.

Review with CSR: Review possible discounts with PM before deciding on sortation discount.

SCF- CLIENT

- A price category available for certain types of mail presorted to an SCF. (2) A presort level in which all pieces are for delivery within the same SCF. We take discount and pass savings along to client.
- A postal facility that serves as the processing and distribution center (P&DC) for Post Offices in a designated geographic area as defined by the first three digits of the ZIP Codes of those offices. Some SCFs serve more than one 3-digit ZIP Code range (3)

SCF- FM: A price category available for certain types of mail presorted to an SCF. (2) A presort level in which all pieces are for delivery within the same SCF. We take discount and keep savings. Client charged full prict for postage.

SCF- MUST: Direction to DP that an SCF discount MUST be taken.

SCF SORT, DDU DROP: Direction to DP to sort for SCF rates, but drop the mailing at the DDU.

TYPE

Tells everyone downstream what class of mail we are sending the pieces as.

BPM

- Bound Printed Matter (BPM) is a subclass of Package Services. The USPS does not guarantee the delivery of BPM within a specified time. BPM might receive deferred service. Prices based on the piece category.
- A Package Services product weighing not more than 15 pounds that consists of permanently bound sheets of which at least 90% are printed with advertising, promotional, directory, or editorial matter (or a combination of such matter). Examples include book, catalog, and telephone directory.

Express Mail: Accelerated mail delivery service for which the customer pays a surcharge and receives faster delivery. Express mail is a service for domestic and international mail.

FedEx: Pieces will be sent via FedEx, not USPS. See website for eligibility requirements and delivery times.

First Class Mail

- Maximum weight: 13 oz
- Maximum weight for FC letter: 3.5 oz
- Minimum qty for Presort Pricing: 500

- Guaranteed delivery in 1-3 business days.
- A mail class that includes all matter wholly or partly in writing or typewriting, all actual and personal correspondence, all bills and statements of account, and all matter sealed or otherwise closed against inspection.
- First-Class Mail comprises six products: (a) single-piece letters/postcards, (b) presorted letters/postcards (nonmachinable, machinable, and automation prices), (c) flats (single-piece, presorted, and automation prices), (d) parcels (retail, Commercial Base, and Commercial Plus prices), (e) outbound single-piece First-Class Mail International, and (f) inbound single-piece First-Class Mail International. Any mailable matter may be sent by First-Class Mail service. First-Class Mail service is a market dominant product.

Parcel Select

- Economic ground delivery services for bulk packages; shipments can weigh up to 70#; Delivery ranges from 2-8 days; Rates based on distance, weight, and dimensions of piece.
- The Parcel Select product marking that is used on the face of a mailpiece to indicate to USPS the service level to be provided and, when combined with other price-specific markings, to show the product or price category claimed. The same marking is used for Parcel Select mail entered at destination network distribution center (DNDC), destination sectional center (DSCF), and destination delivery unit (DDU) prices. The marking for NDC Presort is PARCEL SELECT NDC PRESORT or PARCEL SELECT NDC PRSRT. The marking for Origin NDC Presort is PARCEL SELECT ONDC PRESORT or PARCEL SELECT ONDC PRSRT. The marking for Barcoded Parcel Select is PARCEL SELECT BARCODED or PARCEL SELECT BC.

Periodicals (Reg & NP)

- Designed for newspapers, magazines, and other periodical publications whose primary purpose is transmitting information to an established list of subscribers or requesters.
- Periodicals must be published at regular intervals, at least four times a year from a known office of publication, and be formed of printed sheets. There are specific standards for circulation, record keeping, and advertising limits. There are special lower postage prices for Nonprofit, Science-of-Agriculture, and Classroom Periodicals.
- Type of Piece Allowed in Class: Letters, Flats, and Irregular Parcels qualify.
- Type of Sort Allowed by Piece: Letters: auto/nonauto only; Flats: barcoded or nonauto only; Irregular Parcels: nonauto only.

Priority Mail: Priority Mail is an expedited service and may contain any mailable matter weighing no more than 70 pounds; Service objectives for delivery are 1 to 3 days; however, the USPS does not guarantee the delivery time.

PS Lightweight:

- Designed for packages weighing less than 1 lb. and are used for order fulfillment, packages must be presorted and enter the mailstream at one of three entry points: Destination Delivery Unit (DDU), Sectional Center Facility (SCF) or NDC.
- Type of Piece Allowed in Class: Only machinable/ nonmachinable parcels qualify.
- Type of Sort Allowed by Piece: Barcoded/ Nonbarcoded.

STD A, NonProfit/ Regular:

- Maximum weight: less than 16 oz
- Minimum qty for Presort Pricing: 200 or 50#
- In USPS Marketing Mail, there are prices for letters, flats/large envelopes, parcels, Marketing parcels and Parcel Select Lightweight parcels.
- Additional savings given to qualified NonProfits, must have a valid NP#.
- Deliveries are not priority, no guarantee on delivery time; usually 3-12 business days, but could be more or less.
- A mail class consisting of eligible matter that is not required to be mailed using First-Class Mail or Periodicals service. Standard Mail matter weighs less than 16 ounces.
- It comprises six products: (a) letters; (b) flats; (c) parcels and not flat-machinables (NFMs); (d) high density and saturation letters; (e) high density and saturation flats and parcels; and (f) carrier route letters, flats, and parcels. Standard Mail matter includes circulars, printed matter, pamphlets, catalogs, newsletters, direct mail, and merchandise. Standard Mail matter may be sent at presorted prices and at automation prices. Standard Mail service is a market dominant product.

UPS: Pieces will be sent via UPS, not USPS or FedEx. See website for eligibility requirements and delivery times.

- Type of Piece Allowed in Class: Any piece may be sent this way.
- Type of Sort Allowed by Piece: No Sort.

CAT (Category)

Tells everyone downstream what type of piece we are mailing.

★ See: Common Mail Pieces and Dimensions

Catalog: A catalog is a bound flat-sized mailpiece with at least 16 pages. Must contain an order form, phone number, or web address and provides shipping options for products. Specifically, Bound Printed Matter consisting entirely of advertising. The term is also applied more generally to mailpieces of any mail class, especially Standard Mail pieces, mainly consisting of mail-order advertising.

Double Postcard: A double postcard consists of two attached cards, one of which is designed to be detached by the recipient and returned by mail as a single card.

Flat: Large envelopes, newsletters, and magazines. A mailpiece that exceeds one of the dimensions for letter-size mail (11-1/2 inches long, 6-1/8 inches high, 1/4 inch thick) but that does not exceed the maximum dimension for the mail processing category (15 inches long, 12 inches high, 3/4 inch thick). Flat-size mail must be rectangular with four square corners or with finished corners that do not exceed a radius of 1/8 inch. Flat-size mail must also be flexible. Minimum dimensions are different for flat-size mail claimed at automation prices. Flat-size mail may be unwrapped, sleeved, wrapped, or enveloped.

Flat Rate Envelope: Same as flat, but used specifically for Priority Mail. A USPS-provided Priority Mail Express or Priority Mail mailing envelope that is charged a single predetermined price regardless of the delivery destination or the actual weight of the contents placed inside the envelope, as long as the contents fit completely within the envelope without enlargement or reconstruction. In addition to the standard Flat Rate Envelope, optional USPS-produced envelopes include a Gift Card Flat Rate Envelope, Legal Flat Rate Envelope, Padded Flat Rate Envelope, Small Flat Rate Envelope, and Window Flat Rate Envelope. Additional requirements apply to international mail. The term used as a general modifier without reference to the official product name can be written as flat-rate envelope.

Irregular Parcel: An irregular parcel is pretty much everything that is not a letter, flat, or machinable parcel. The classification includes rolls and tubes up to 26" long, and anything else that is too big or too irregularly shaped to be sorted on automated equipment. A mail processing category for a nonmachinable parcel that does not meet the dimensions or minimum weight of a machinable parcel. This processing category includes parcels that cannot be processed by NDC parcel sorters, including rolls and tubes up to 26 inches long; merchandise samples that are not individually addressed and are not letter-size or flat-size; unwrapped, paper-wrapped, or sleeve-wrapped articles that are not letter-size or flat-size; and articles enclosed in envelopes that are not letter-size, flat-size, or machinable parcels because of an irregular shape. The term is most generally applied to nonmachinable Standard Mail parcels.

Letter: Any cards or envelopes that meet the dimension requirements. A mail processing category that consists of letters and cards meeting minimum size standards and not exceeding the maximum letter-size mail dimensions of 11-1/2 inches long, 6-1/8 inches high, and 1/4 inch thick.

Machinable Parcel: If you prepare your parcels so that they can be processed on Postal Service equipment, your mail is "machinable." Machinable parcels must meet specific standards for size, shape, content, and weight. A mailpiece that is of the correct size, shape, and weight to be safely sorted by mail processing machinery such as a parcel sorting machine.

Marketing Parcel: Marketing parcels containing mailable items not required to be sent using First-Class Mail can be sent using USPS Marketing Mail. USPS Marketing Mail Marketing parcels are typically used for advertisements, flyers, catalogs, and product samples. Additional content restrictions must be met for authorized nonprofit mailers

Nonmachinable Parcel: A parcel or mailpiece that, because of size, weight, or other characteristic, cannot be sorted by mechanized mail processing equipment and must be handled manually. The parcel is called an outside because it cannot be placed into a sack or other mailing container. Nonmachinable parcels exceed any of the maximum dimensions for machinable parcels. This category also includes certain high-density items, cartons containing more than 24 ounces of liquids in one or more glass containers, cartons containing 1 gallon or more of liquid in metal or plastic containers, and items in 201.7.7 of the DMM.

Parcel: USPS categorizes parcels into one of three mail processing categories: machinable, irregular, or nonmachinable. These categories are based on the physical dimensions of the piece, regardless of the placement (orientation) of the delivery address on the piece. Dimensions: Minimum: 3 x 6 & ¼" thick. Maximum: 17 x 27 & 17" thick.

Postcard: A postcard or post card is a rectangular piece of thick paper or thin cardboard intended for writing and mailing without an envelope. Shapes other than rectangular may also be used. A commercially produced and sold rectangular card designed for writing and mailing without an envelope and requiring First-Class Mail card or letter postage, depending on the dimensions. Postcards generally show a photograph or illustration on one side.

POSTAL CLASSES

- First Class Retail (Single Piece Rate)
- First Class Presort
    - delivered in 2- 5 days across the country
    - requires at least 500 automation addresses
- Standard Class Presort
    - delivered approximately 1 week Northeast, 2 weeks Midwest and South, 3 weeks West Coast
    - requires at least 200 automation address
- Non-Profit Standard Class Presort
    - delivered approximately 1 week Northeast, 2 weeks Midwest and South, 3 weeks West Coast
    - requires at least 200 automation addresses

POST AFFIX

What type of postage are we "affixing" to the mailpiece?

Mail Anywhere Permit

- Used when client permit is on mailpiece
- Allows us to audit and enter mailing at our Post Office instead of Post Office where client permit is held.

Meter

- Postage evidence (prepaid postage) presented in the form of an Information-Based Indicia or non-IBI indicia from a USPS-approved postage meter or PC Postage system printed directly onto the mailpiece or onto an adhesive label affixed to the mailpiece.
- This postage payment method may be used on all mail classes and products except Periodicals and Bound Printed Matter.

Permit

- Printed indicia, instead of an adhesive postage stamp or meter stamp, that shows postage prepayment by an authorized mailer.
- Any authorization required for specific types of preparation or postage payment. Specifically, an authorization to mail by using indicia or an imprint in place of stamps or meter impressions.
- Payment is made against an advance deposit account that is established with USPS for postage and services. Other types of mail, such as Business Reply Mail, service require the use of imprints.

★ See: WHAT IS A PERMIT/INDICIA?

Precancelled Stamp

- A postage stamp cancelled by marking across the face before it is sold to mailers for use with bulk mailings. Also, a stamp designated as a precanceled stamp without cancellation marks.
- Mailpieces with these stamps do not go through a canceling machine at the time of mail processing.
- Precanceled postage is an optional postage payment method for mailings at Presorted and automation First-Class Mail prices and at all Standard Mail prices.
- An optional postage payment method for presorted First-Class Mail and all Standard Mail pieces that uses precanceled adhesive postage, Stamped Envelopes, or Stamped Cards.
- The cancellation of the postage may be done by the mailer under a postal permit, or the precanceled postage can purchased from USPS.

Retail Stamp

- A gummed or self-adhesive paper stamp affixed to mail as payment for postal services. Types of stamps include definitive stamp (regular-issue stamp), special-issue stamp, and commemorative stamp. Used on First-Class Single Piece Rate mailings.

Permit

Account Managers will ensure that each work order has a permit number entered in this field, even if it is Permit #1 (Five Maples). Hadley permit # is 62.

HOLDER

Enter who owns the permit (Five Maples, Hadley, etc.)

POST STATUS

HOLD: Not commonly used; can be used for internal jobs only or print only jobs for inventory. Tells warehouse to not ship this out. Direction should be given in the warehouse section of the work order on how to handle once it reaches them.

MAIL: Let's the warehouse know the mailing is good to process and send out.
PENDING: If postage estimates are greater than $1,000 or we feel we need prepayment of postage prior to mail date, we will use this selection. It tells warehouse the postage is pending and to wait to hear from PM on release.

PICK-UP: Tells warehouse someone (client) will be picking the mailing up; we will not be mailing the pieces. Contact information should be given in Warehouse section in order for Warehouse to let client know mailing is ready.
SHIP: Tells warehouse pieces will be shipped back to client, not mailed here. Mailing addressee and address should be provided in the warehouse section so they know where to send the package(s).

★ See Procedure: Billing Postage with Processing

★ See Procedure: How to Create a Postage Estimate & Invoice in QuickBooks

Comments

Account Managers should always enter CRID (Customer Registration ID) numbers in this area. Enter non-profit authorization numbers in this area when needed.
★ Learn about NP#/CRIDs and how to look them up here.

PROCEDURES & HOW TO'S

HOW TO CREATE A NEW CUSTOMER IN MAILSHOP

1. Choose "CRM/Customers" from home screen
2. Click "Add New Customer" button at bottom
3. Enter a Customer Code
    a. The Customer Code is a 4-letter code made from the first two letters of the company's first word and the first two letters of the company's second name (e.g.: **Pr**oject **Br**ead = PRBR or **Bi**blical **Ar**chaeology Society = BIAR).
    b. If the company has only one name such as "Altiplano," just the first 4 letters in the name (e.g.: **Alti**plano = ALTI)
    c. If the company has multiple words in its name, use your best judgement that will be easily recognizable for the rest of the company (e.g.: **A**merican **C**ouncil of **L**earned **S**ocieties = ACLS)
    d. If the company has a "The" before the rest of the name, try not to use "TH" in the Customer Code (e.g.: The Chill Foundation = CHFO)
4. Enter rest of Contact information:
    a. Company Name
    b. Address information
5. Navigate to "Contacts" tab and enter your primary contact's information. This person's name will appear on estimates and work orders.
6. Enter yourself as the sales rep and the CSR.

HOW TO RECEIVE MATERIALS

What to do when material comes in for a work order that is waiting for materials:

1. Find the work order.
2. Be sure that the work order reflects the correct information and that everything you thought about the piece before its arrival is still true. Confirm:
    a. Postage Method
    b. Mail Class
    c. Piece size & weight
    d. Tabbing
    e. Folding
    f. Etc.
3. Weigh the samples and get an accurate piece weight using the actual materials for the mailing.
4. Create a 'LIVE' sample (Domestic and Foreign)
    a. Write weight on sample (weigh 3 pieces, get total weight, divide by three, use this 'per pc' weight
    b. Write wo # on sample (use 'sample' stamp)
    c. Update the postage on the sample (what kind of stamp?, Who's indicia?, etc.)
    d. Put sample in the work order
    e. Remove the dummy sample if present.
5. Update Mail Shop:
    a. Allocate the material to the work order in MailShop > See Inventory.
    b. Update weight (if needed)
    c. Check MATERIAL IN box
    d. Take job off hold (if needed)
    e. Confirm direction to warehouse for residual material handling is correct.
    f. If material arrives later than planned, update the drop date on the work order and master schedule and inform production.
6. Reprint the Warehouse work order.
    a. If there is no reason to save the old Warehouse Work Order, remove it **after transferring any information already written on it to the new work order**, then discard the old one
7. Staple the warehouse skid flags (in reverse) and 1 sample of each mail piece to the new Warehouse Work Order.
8. Return the work order to the correct production location.

HOW TO DETERMINE A DROP DATE WITH THE TURN-AROUND TIME CHART

Things to note:

Includes standard LCP, NCOA, and dedupes for small jobs					Busy season: base time temporarily extended by x days:			0				
Merges include standard DP work, but not complicated dynamic merges, or extensive coding												
Days based time extended by:												
		See Lettershop Manager about Handwork										
Run Speed/hr		10000	5000	1250	3000	1800	1500	800	1700	1200	800	600
Quantity up to	Print Days	Days turnaround indicated by color										
1,000	0	3	3	3	3	4	4	3	4	5	5	6
2,500	0	3	3	3	3	4	4	3	4	5	5	6
5,000	0	3	3	3	3	4	4	3	4	6	6	6
10,000	0	3	3	3	3	4	4	4	4	6	6	6
15,000	0	3	3	4	3	4	4	5	4	6	6	6
20,000	0	3	3	4	3	4	5	6	4	6	6	6
25,000	0	3	3	4	4	4	5	7	4	6	6	7
30,000	0	3	3	5	4	5	5	8	4	7	7	7
40,000	0	3	3	5	4	5	6		5	8	8	8
50,000	0	3	4	6	5	5	6		5	8	8	8
75,000	0	4	4	7	6	6	6		5	9	9	9
100,000	0	4	5	8	7	6			7	9	9	9
150,000	0	5		8	7							
>150,000												

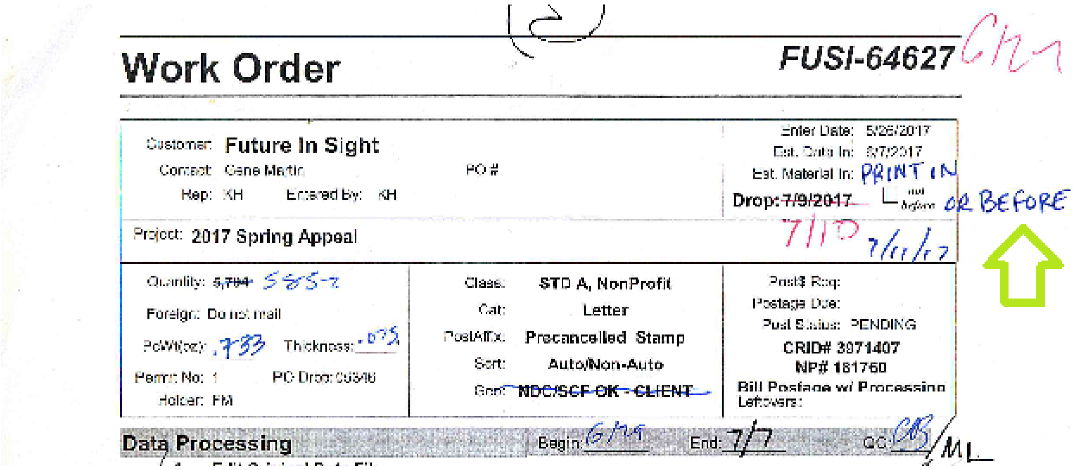
- The chart includes STANDARD Data Processing, Printing, and Production time only, from the day that it is put forward to the table for pickup and entry into the queue.
- Days are measured from the day that both data and materials have arrived, not counting the day of arrival, e.g., if materials arrive on Tuesday, and the Standard Turnaround Chart determines a 3-day turnaround, then Friday would be the 3rd day. Standard delivery may be temporarily increased to 4 days during capacity crunches upon agreement at the morning meeting.
- It does not include the Project Manager's time before submitting a work order.
- It also does not include copywriting or design time. Please refer to the Director of Creative & Client Services for Creative Services lead times.
- It also does not reflect processing time for handwork. Please see Production Manager for an estimate of time needed in the Hand Room.
- It does not include complex and extensive Data Processing work (extensive coding, complicated dynamic merges, complex dedupes). Please see Data Processing Manager for an estimate of additional time needed in DP, or consider a Data Preflight.
- During busy season, the chart will be updated to automatically reflect any increase in turn-around time, and the number of days by which it is extended is noted at the top of the sheet. You do not need to factor in additional time.

How to use the chart:

1. Determine the quantity and physical specs of your mailing and refer to the corresponding box. The number inside the box indicates processing time for your project.
    - If a job is submitted before 9am, the day of submission is included in the turnaround time.
    - If a job is submitted after 9am, the following day will be counted as day 1.
2. If there is in-house printing to be done, you must fill in the print section checkboxes prior to being able to determine your drop date. As you fill them in, the chart will update to reflect your selections.
    - If we are printing multiple pieces, make selections for both First Piece and Second Piece (letter & reply card)
    - A key to the "Finished Product Size" selection is off to the right side of the sheet. The "<>5x7" selections refer to postcard size.
3. If printing is being outsourced, please ask the vendor for an estimated timeline until delivery and factor in any changes to lead time if you will be waiting on materials.

Treatment of the Drop Date: OR BEFORE, NOT BEFORE, RUSH

OR BEFORE – Or Before is added manually by the Project Manager as indicated in this image below. Or Before is used to let all downstream departments know that a mailing is approved to mail before the mail date on the work order.



Work Order FUSI-64627 6/21

Customer: Future In Sight
Contact: Gene Martin
Rep: KH Entered By: KH
PO #
Enter Date: 5/26/2017
Est. Data In: 6/7/2017
Est. Material In: PRINT IN
Drop: ~~7/9/2017~~ not before OR BEFORE
7/10 7/11/17
Project: 2017 Spring Appeal

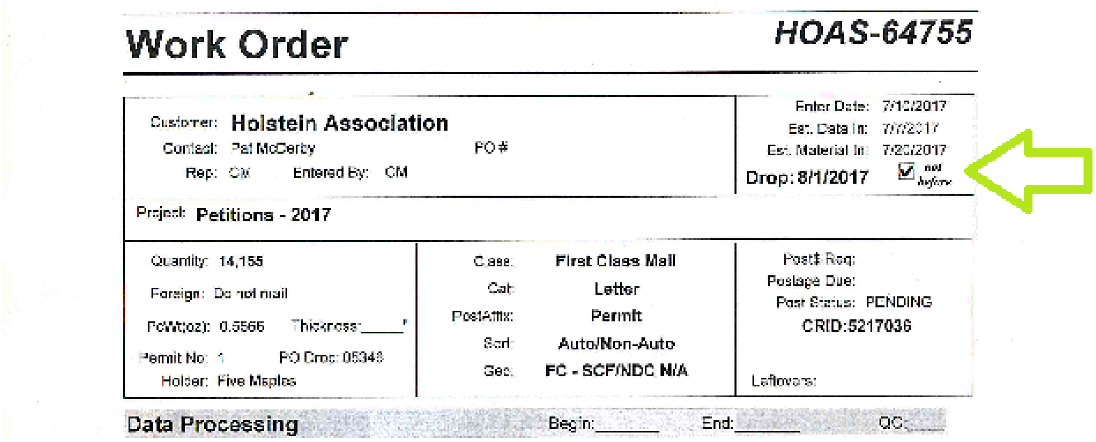
Quantity: ~~5,704~~ 5585-2
Foreign: Do not mail
PcWt(oz): .733 Thickness: .075
Permit No: 1 PO Drop: 05346
Holder: FM

Class: STD A, NonProfit
Cat: Letter
PostAffix: Precancelled Stamp
Sort: Auto/Non-Auto
Geo: ~~NDC/SCF OK - CLIENT~~

Post$ Req:
Postage Due:
Post Status: PENDING
CRID# 3071407
NP# 181760
Bill Postage w/ Processing
Leftovers:

Data Processing Begin: 6/29 End: 7/7 QC: CB/ML

NOT BEFORE – Not Before is indicated by selecting the check box next to the mail date titled not before. Not Before indicates to all downstream departments that this work order should not mail before it's drop date.



Work Order HOAS-64755

Customer: Holstein Association
Contact: Pat McCarby
Rep: CM Entered By: CM
PO #
Enter Date: 7/10/2017
Est. Data In: 7/7/2017
Est. Material In: 7/20/2017
Drop: 8/1/2017 ☑ not before
Project: Petitions - 2017

Quantity: 14,155
Foreign: Do not mail
PcWt(oz): 0.5566 Thickness:
Permit No: 1 PO Drop: 05348
Holder: Five Maples

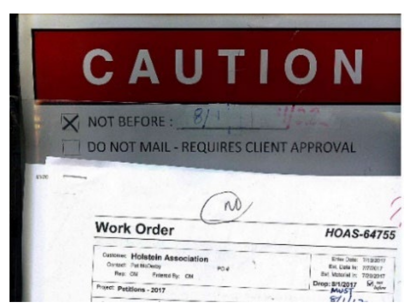
Class: First Class Mail
Cat: Letter
PostAffix: Permit
Sort: Auto/Non-Auto
Geo: FC - SCF/NDC N/A

Post$ Req:
Postage Due:
Post Status: PENDING
CRID:5217036
Leftovers:

Data Processing Begin: End: QC:

CAUTION PLACARD

In addition to selecting the check box, all 'not before' work orders should include a 'NOT BEFORE' placard. The placard should be included all iterations of the work order including the consolidated work order, foreign work order, print work order and client services work orders.



OR BEFORE + NOT BEFORE

Use of both ‘or before’ and ‘not before’ can occur on a single work order. For example, if we are processing an appeal with a variable letter that is dated October 1, 2017 and the mailing has a drop date of October 3rd. It would be appropriate to say ‘or before’ 10/3 but ‘not before’ 10/1. In this scenario, it would be appropriate to manually write in ‘or before’ and include ‘not before’ placards with a not before date of 10/1/17.

CHANGING TO NOT BEFORE

Occasionally a work order that has been released changes from ‘or before’ to ‘NOT BEFORE’. In this case the project manager should inform the DP Manager as soon as possible. The DP Manager will update the work orders with the NOT BEFORE placards and inform all production departments of the change in status. The DP Manager will confirm the change within 30 minutes of being notified. If the DP Manager fails to report back to the PM, the PM should contact the DP Manager and follow-up.

RUSH – If a job is a rush, or has many or special time-consuming steps, the PM should bring it to the attention of the Operations Manager at the morning meeting, or find the OM during the day when the job goes live. Write **Rush** by hand on the Work Order next to the drop date. Charges apply.

ALL ABOUT SAMPLES: HOW TO MAKE ONE, WHAT KIND TO MAKE, AND WHEN

How to make a sample

Weigh 3 samples of the mailing, or 3 accurate dummies, on the postal scale, and divide by 3.

Receiving Samples

Each PM must have a clearly marked location at their desk that is reserved only for received materials.

Dummy Samples

- Same as previous mailing: If the printer/client confirm to the PM that the mailing is the same size and on the same weight paper as a previous mailing, then a sample from a previous mailing may be used as a dummy sample to submit the work order, and the weight from that work order may be used.
- Print In: Dummy samples that consist of standard materials for a job that will be printed in (e.g., 70# Finch Digital Opaque Letter, #80 Accent Opaque Reply, #9 24# White Wove Envelope, into #10 24# White Wove Envelope) also may be made to serve as an accurate sample.
- Print Out: Printers may also provide dummies in advance when completion of the DP work prior to the actual pieces arriving is necessary or favorable.

Things to note about Samples:

- In many cases we have a lot of confidence in using previous pieces or printer dummies. But, in general we prefer live work orders with samples made from the actual pieces when there is any doubt, rather than dummies, to avoid possible rework of the postal paperwork by DP.
- We also call a sample with all the real, actual pieces a 'live sample'.

THINGS TO LOOK FOR WHEN REVIEWING DATA FILES

What DP needs to know in general (explain this under "load file"):

- If there are mixed cases and how to correct
- If there are soft returns
- If there are multiple addressing fields (beyond normal Add1/Add2), which to use
- If there are multiple name fields, which to use
- Which codes to include
- If we instruct to "Load all fields," indicate why (for returning final mail file to client)
    - NOTE: It is MUCH more difficult and time consuming to retain original column names if not necessary
- It is preferred to indicate "Load all fields needed for addressing" or "Load all fields needed for merge"
    - NOTE: The names of the variable fields in your variable merge sample document should match the column names in the list
- It is not necessary to list each field individually unless the list has excessive columns and it is unclear which fields would need loading.

What DP needs to know by field:

- NAME: DP automatically checks if first name AND last name are blank and there is no Business/Organization name and will remove it.
- Unless it is a merge, it is not necessary to indicate that First Name or Last Name are blank (if only a handful of records. Use your judgement based on list size).
- If a record had "Joe" in the first name field, and no last name, it would NOT be corrected and would mail as "Joe." Know your client. If they would like this corrected, they must fix the list.
- TITLE, PREFIX, SUFFIX: If they are present in the list, they will be loaded unless you indicate otherwise.
- ADD1/ADD2: DP automatically checks if all address fields are blank and will remove it.
- If there are additional addressing fields necessary to use, please indicate.
- CITY: Indicate if it contains information other than a city.
- STATE: Indicate if state names are spelled out. Mail Manager will only pull in the first two letters of the state field starting from the left. (Ex: "Maine" would pulled in as MA, Massachusetts).
- Not necessary to indicate if there are periods or lower cases.
- COUNTRY: Field is not necessary if all domestic.

WHAT TO INCLUDE IN THE JOB BAG FOR A MERGE JOB

Make sure that everything that you have written under the “Set Up Merge” code in DP is accounted for within your job bag materials:

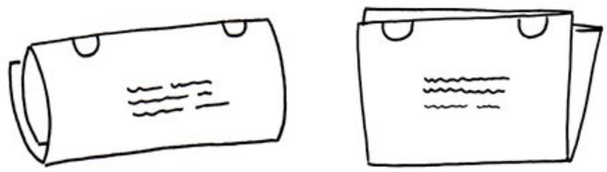
1. A print out of each variable document/version
    - If you have two letter versions, you should print both versions. If you have a letter and a reply card, both should be printed and included in the job bag.
    - The path file name of the document should be written or printed directly on it.
    - You may also indicate which version the document is if it isn’t clearly noted in the document name by writing the version on the document (Ex: “Donor Version” “Large Donor Version”
2. Variable info check
    - Make sure that all variable fields’ (usually indicated by “<field>”) names match the name of the corresponding field in the data file. For example, if the reply card says <Addressee> but the data file uses [Title] [First Name] [Last Name], the print out should be corrected to reflect the data.
    - Highlight all variable fields with a yellow highlighter, including the presort sequence number, if applicable. Check each document carefully for variable fields (Ex: An <ASK2> in a letter that is within a paragraph)
3. Any changes or corrections to the static information on the document
    - Should be noted in the “Set Up Merge” service code AND corrected on the document print out. (Ex: Change date on letter to drop date- cross out the date and write “Drop Date”; Change a static appeal code, etc.).
4. If there is a separate document/email with instructions for a variable field that is NOT in the data (Ex: P.S.s), print this out and include in the job bag.
    - Include direction under Set Up Merge to this this document and make sure to include the name of the document.

WHAT IS THIRD PARTY PROOFING?

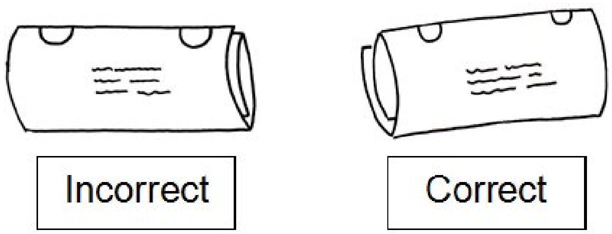
Before we email variable data proofs as PDFs to the client for proofing, we do internal proofing as part of quality control. This is called Third Party Proofing.

1. Data processing gives merged proofs to PM
2. PM fills out third party proofing form (Variable Data Proofing Form) by doing the following:
    a. Comparing the document (letter, reply form, etc.) in its entirety to the final design or original document from the customer
        i. Verify line breaks, margin, font, text wrapping (identify any FM introduced widows, orphans, or lines broken in middle of hyphenated word), spacing, formatting of variable data (address, salutation, ask amounts), image placement, caption placement, date, page number, logo, header, footer, sidebar, color breaks, signature
    b. Verify variable data
        i. Sequence number and position
            1. See sequence placement overlay
            2. Verify that sequence numbers between letters, reply forms, etc. match
        ii. Compare merged data to original data file
            1. Search for ID in file if available.
            2. If ID unavailable, search for name or address information.
3. Finally, the PM sends an email to all other Project Managers asking for someone else to do the third round of proofing
    a. If both proofers agree that everything is correct, use process for sending static proof to client
    b. If either proofer finds anything, PM takes proof back to DP for revision
        i. DP revises proofs
        ii. PM verifies that changes were made correctly and that nothing else changed
            1. No need to third party proof again
        iii. If changes are correct, follow process for sending static proof. If incorrect, repeat.

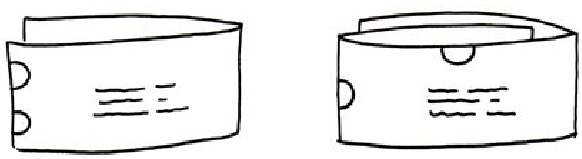
HOW TO TAB A SELF MAILER



Tri-fold and quarter-fold flyers and newsletters need two tabs



For tri-folded self-mailers, the mailing address must be on the middle panel, with the final fold creating the non-address side.**

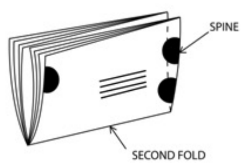
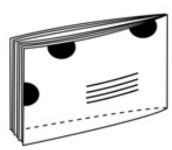
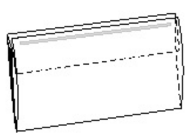


What the post office calls oblong self-mailers must have the final fold on the right side, or 'leading edge'. Two options for tabbing are shown.

****EXCPETION: For Tri-fold self-mailers, the final fold can create the mail panel but an extra tab is required on the leading edge.**

★ See all SELF-MAILER tabbing options.

HOW TO TAB A BOOKLET

If the spine or final fold is…	And the length is…	The cover stock must be at least…	Mailers must seal the piece with…	And place the tabs in these locations…
 Spine or fold on the bottom (longer) edge	5" to 9" long	50-pound	Three 1.5" non-perforated tabs	Two tabs on leading edge; one tab on trailing edge. Position lower leading tab 0.5 inch from the bottom edge. Position upper tabs 1 inch from the top edge.
	Over 9", up to 10.5" long	60-pound		
 Final fold on the bottom (longer) edge, with the folded spine on the leading or trailing (shorter) edge	5" to 10.5" long	40-pound	Three 1.5" non-perforated tabs	Folded Booklet Two tabs on leading edge; one tab on trailing edge. Position lower leading tab 0.5 inch from the bottom edge. Position upper tabs 1 inch from the top edge.
 Spine on the leading (shorter) edge	5" to 9" long	60-pound	Three 1.5" non-perforated tabs	Two tabs on top edge; one tab on trailing edge. Position top tabs 1 inch from left and right edge. Position trailing tab in the middle.
	Over 9", up to 10.5" long	70-pound		
 Spine on bottom (longer) edge, non-perforated inner flap on top (upper) edge	5" to 9.5" long	80-pound	Continuous glue line or glue spots	Perfect bound or saddle stitched with a continuous glue line along flap preferred, minimum 1inch glue spots acceptable if placed within ¾ inch of right and left edges.

★ See all BOOKLET options and max weights. Search 3.16 Booklets.

WHAT QUALIFIES AS A PREPRESS SERVICE?

An easy rule of thumb: is this “task” design or layout? **Design** is defined as the art or skill of combining text, images, and other items into a visually pleasing arrangement. The primary difference is that for layout you don't need to **create** anything. Prepress can be considered more like editing.

The following can qualify as a prepress service:

- Add message/tagline
- Update message/tagline
- Add indicia
- Update indicia
- Add return address to envelope
- Insert signature over logo
  - *Note: A determination would have to be made if the signature is transparent; IF IT IS NOT, the file will need to go to Director of Creative Services first for editing*
- Adjust & fit non-merge copy to letterhead
- Adjust dimensions of a client document to fit the printing specs (envelope, postcard or letters)
- Create #10 envelope with logo & return address
- Create #9 envelope
- Resize images to have a white border because they do not have bleeds
- Change color of existing design (i.e., tagline color, border colors, etc.)
- Create static replies from existing merge documents
  - *Note: If this takes longer than 15 minutes, the Print Dept. will notify the PM to add additional charges if necessary.*

PROOFING

For Design proofs and Static Print Proofs, third party proofing is not required. However, there are things you want to check for when comparing the proof to the original document:

1. Does the font match client the supplied document / final design?
2. Compare line breaks, margins
3. Are the graphics printing correctly?
4. Are color breaks and hyperlinks printing in correct color?
5. Correct stock? If our stock, data processing will generate PDF proof. If client stock, DP will print on client stock and scan.
6. Color Match correct?

PDF PROOFS

After PM reviews proofs, the PDF proofs are sent to client following this procedure after internal proofing:

1. PM emails PDF, asks for client approval via email
    a. Send proof as a new email or forward proof email from Design/Data Processing/Print Department (in cases where no other discussion is happening between departments)
    b. Subject line: Proof # - Work Order # - Customer Name - Type of Proof (Variable Letter, Static Postcard, etc.)
    c. Comments / Questions: "I've noticed this on the proof. Is this okay?"
    d. Request specific turnaround time: "I need this approved by (the end of the day tomorrow) to stay on schedule. Whatever you can do to expedite the approval process is appreciated." Be realistic.
    e. Include signature with contact info
2. Client approves proof
    a. Print out approval email, highlight subject line and client approval verbiage, staple it to proof, give proof and work order to appropriate department
3. Client requests changes
    a. Print email, highlight subject line, staple to proof, give proof and work order to appropriate department
    b. Review revised proof in entirety and verify changes
    c. Email to client: reply to original proof email thread, change proof # in subject line
        i. Please review the attached revised proof. We've made the changes you requested. Please let me know if you wish to make any other changes or if we're approved to print.

HARD COPY PROOFS

If a client requests hard copy proofs, the PM follows this procedure after internal proofing:

1. Two hard copy proofs are generated: One for Five Maples, one for the client (whether printed out or printed here)

2. If shipping to client: PM gives hard copy proof to the Warehouse Manager along with address and contact. Warehouse ships to client via UPS (ground or next day, depending on schedule)
    a. If printed out: printer can send to Five Maples and PM will send to client, or printer can send to client directly but not include their own proof slip
    b. Client can review hard copy and email their approval (PM will retain a copy here; this is faster than having the client send back hard copy proof)
3. If client comes into office, they can sign off on one proof
4. If/when approved, this becomes the contract proof
5. If client requests changes:
    a. FM or printer makes requested changes
    b. Client will decide method of approval
        i. If just text changes, possible to do a PDF for final approval
        ii. If color or image related, up to client whether they want PDF or hard copy

HOW TO PRICE FIVE MAPLES PRINTING USING THE PRINT PRICING ESTIMATOR

	Clear Option 1	Clear Option 2	Clear Option 3	Clear Option 4	Clear Option 5
Clear All	#10 Option	6x9.5 Option	A-7 Monarch Option	Postcard Options	DIR
Client:	**Quote Number:**	**Job Number:**	**Date:**	Minimum Print Dimensions: Canon B&W 1110 = 7.12" wide x 7.12" long Canon Color C700 = 4.0"" wide x 5-7/8" long	
	Option 1	**Option 2**	**Option 3**	**Option 4**	**Option 5**
Type					
Choose Paper Source					
Choose final size (if from MR stock)					
Choose paper stock (if from MR					

- Use Prices 2.0 (L:/Five Maples Sales/Prices/Prices 2.0)
- This document is Read Only so that you cannot save over it. To save a copy, rename and save in the Quotes Folder for the client or other convenient location.
- There are two tabs to price Five Maples Printing: **Envl** and **Printing 2**
- There is an exact copy of this workbook saved as L:/Five Maples Sales/Prices/Prices 2.0 Backup/Prices 2.0 Backup.xlsm. If you feel that you have screwed up Prices 2.0 you can copy the backup over it to restore it to original condition. Never fear, there is also a backup saved.
- Prices 2.0 is very easy to use. To get pricing, work from top to bottom.

Buttons

The buttons located at top of Envl and Printing 2 allow you to populate the most common choices with just a click. Then you can make any changes you need.

Color Codes

- Green means you should consider printing a shell; overall cost may be lower
- Pink means our price may be uncompetitive; you should get a print out quote to compare
- Purple means our markup on printin is less than 1.5; you should either get a printout quote to compare cost, consider printing a shell, or discuss with Gary

Special Order Paper

Enter the Cost/M. This means that you would take the total cost for the amount you have to buy (say $249 for 5000), and manually divide by the print quantity (say 4500) to get the Cost each, then multiply by 1000. For example $249/5000 = $.0498 x 1000 = $49.80/M is the Cost you enter. Then enter the Number Up.

Printout

You don’t need to enter a number up, since we aren’t doing any printing. You will automatically get the selling price (which is the cost/M times 1.3).

Printout Shell

If you are printing out a shell, you either enter select Five M. Special Order and enter the shell cost, in which case we are charging for the shell as part of our print price. This would be the normal method for smallish quantities. OR

Invoice for the shell separately, and choose “Client” as the Paper Source (this is the Project Bread method for example). Process A generally results in a higher price and isn’t appropriate for large mailings…it ends up marking up the shell too much. Ask Gary if you aren’t sure on a quote which method to use.

Labels

Label pricing works for 4 common label sizes. If you need to price another label size, use “Five M Special Order” on the Choose Paper Source drop down and enter the Cost/M (that means Cost per thousand) in the “Enter Paper Cost/M if special order or print out” cell and the number up in the “Enter number up for client supplied or special order paper” cell.

WHEN TO USE THE REPAIR ALL SERVICE CODE

Repairing refers to the replacement or repair of a mail piece or component physically damaged during printing, folding, addressing, inserting or other production activities. The Repair service code must be used in all departments.

Repair All is used for:

- Lists containing boards, trustees, current or previous donors, school alumni, customers, distributors, bank regulatory notices, other legal notices or mailings, human resources mailings.
- Special invitations, or expensive mailings (e.g., art gallery exhibition to an exclusive list)
- Any mailing being returned to the customer for completion and mailing, e.g., to get Board signatures.
- Partner mail merges.
- Product fulfillment, such as UMASS calendars, Entergy battery mailings, New Chapter books.
- *Exception*: AM Judgment may be used in a case when perhaps repair all is not necessary.

Repair All is NOT used for:

- In general, any non-personalized mailing is NOT Repair All, with exceptions as indicated above.
- Personalized Acquisition or Prospect Mailings: Defined as a mailing to someone who is not a previous donor or customer.
- Examples of personalized mailings that are NOT repair all: Purchased or borrowed lists, Patient lists, Attendance or membership lists, Town lists.
- *Exception*: AM Judgment may be used in a case when repair all is required after all.

When an acquisition list is combined with a previous donor list in the same mailing, then the mailing must have a Repair All code. This is frequently the case with schools.

BILLING POSTAGE WITH PROCESSING

- If the postage amount is less than $1000, you can bill postage with the processing invoice (see billing). The Postage Status will be MAIL.
  - Accounts Payable will automatically add 2% to each postage amount that is “bill postage with processing.”
- If the postage amount is more than $1000, you must create a postage estimate and the customer must send the postage in advance before we will mail the job. The Postage Status will be PENDING. Some clients, like Hadley Printing, prefer an Actual Postage Invoice.

WHAT IS A PERMIT/INDICIA?

Permit imprint is a popular and convenient way to pay for postage, especially for high volume mailings. Instead of using precanceled stamps or a postage meter, the mailer prints postage information in the upper right corner of the mail piece. This postage block is called an "indicia."

Indicia’s can be in a box or not. Minimum 7-point font. Below are the most common indicia’s we use:

PRESORTED FIRST CLASS MAIL U.S. POSTAGE PAID PUTNEY, VT PERMIT #1	PRSRT STD U.S. POSTAGE PAID PUTNEY, VT PERMIT #1	NONPROFIT ORG. U.S. POSTAGE PAID PUTNEY, VT PERMIT #1

HOW TO CREATE A POSTAGE ESTIMATE & INVOICE IN QUICKBOOKS

Postage Estimate Invoice

1. From the QuickBooks homepage, select "Create Invoices."
2. In "Customer Job" field, type your customer's name, followed by a colon and the Work Order number (no spaces), hit "enter."
    a. Sometimes QB removes the colon, be sure to watch out for this and add it back. If you proceed without adding, you will add a new customer, not a new job. If this happens to you, let Accounts Payables know and she can remove the new customer by going into Single User Mode.
3. A pop up box will appear informing you that this job does not exist, select "Quick Add" to create invoice.
4. Verify the invoice date, client billing information, PO, and Rep are all correct.
5. Set "TERMS" to "Due on Receipt"- do not save new terms to QB when prompted.
6. Skip one line after all postage lines and enter the Project Name (typically name of job/work order, "2017 Annual Appeal."
7. Click "Print" icon in the bar above the invoice. Select to print to "Adobe PDF" and hit the print button. A popup will appear prompting you to save the invoice. Save it to the client folder on the L Drive with the correct work order folder as "Postage Estimate (Invoice #).
8. Finish printing a hard copy and write in the top right corner the date the invoice was sent to client. Email electronic copy to client.

- FOR DOMESTIC POSTAGE – In the "ITEM" box, type or select USPS (Postage Estimate #). Fill in quantity of mailing. Next to "Postage Estimate #" enter the work order number. Enter the per piece rate.
- FOR CANADIAN POSTAGE – In the "ITEM" box, type or select CANADA. Fill in the quantity. Next to "CANADIAN POSTAGE," type "Estimate." Enter the per piece rate.
- FOR FOREIGN POSTAGE – In the "ITEM" box, type or select FOREIGN. Fill in the quantity. Next to "FOREIGN POSTAGE," type "Estimate." Enter the per piece rate.

Exact Postage Invoice

To be used when client requests to know exact postage amount. (Return to PM after presorting).

2. From the QuickBooks homepage, select "Create Invoices."
3. In "Customer Job" field, type your customer's name, followed by a colon and the Work Order number (no spaces), hit "enter."
4. A pop up box will appear informing you that this job does not exist, select "Quick Add" to create invoice.
5. Verify the invoice date, client billing information, PO, and Rep are all correct.
6. Set "TERMS" to "Due on Receipt"- do not save new terms to QB when prompted.
7. Skip one line after all postage lines and enter the Project Name (typically name of job/work order, "2017 Annual Appeal."

8. Click "Print" icon in the bar above the invoice. Select to print to "Adobe PDF" and hit the print button. A popup will appear prompting you to save the invoice. Save it to the client folder on the L Drive with the correct work order folder as "Postage Estimate (Invoice #).
9. Finish printing a hard copy and write in the top right corner the date the invoice was sent to client. Email electronic copy to client.

- FOR DOMESTIC POSTAGE – In the “ITEM” box, type or select ZZUSPS (USPS Postage). Fill in the quantity. Enter the per piece rate or total amount.
- FOR CANADIAN POSTAGE – In the "ITEM" box, type or select ZZCANADIAN (Canadian Postage). Fill in the quantity. Enter the per piece rate.
- FOR FOREIGN POSTAGE – In the "ITEM" box, type of select ZZFOREIGN (Foreign Postage). Fill in the quantity. Enter the per piece rate.

Mail Panel Requirements

Printed Backgrounds

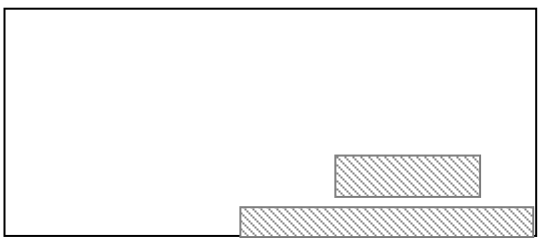
Printed backgrounds in the mail panel area may make the ink-jetted barcode or address unreadable. These guidelines are helpful in determining whether a printed background could be a problem:

- A color field should generally not exceed a 10% screen
- Copy test: using an actual sample, a test address can be printed on a Buskro, and then a Xerox copy made; if the address and bar code on the copy are sharp and clear over the background it will probably be okay

Minimum Space for Address Printing

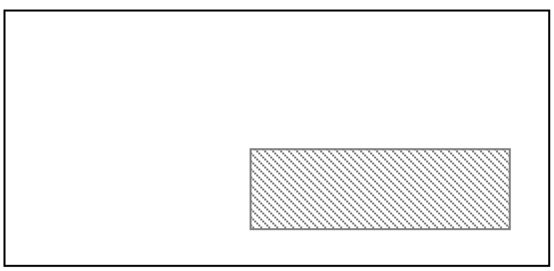
Many factors affect the space requirements for addressing. Several are covered below however, if for some reason a scenario comes up that isn't covered, or if your mail piece/data file pushes the limits of my measurements below, it would be best to ask for a review of the piece **before** releasing the job to production.

1. **Barcode positioned in the bar code clear zone – IMB**



Barcode space needed is 4.125" from right edge of printed piece and .625" from the bottom of the piece. This space must be clear of all printing. The ***USPS overlay*** indicates this space very clearly and is easy to use.

2. Barcode in address block - IMB



Clear space needed on piece for address using the IMB positioned <u>in the address block</u> is 3.25" x 1". If measuring in from the edge of the piece, please add .5" to the measurement from right edge and .625" from bottom edge. This adds the necessary space to position the address in the USPS OCR Read area. That would calculate then, if measuring from the bottom right corner of the mail piece, to a space of 3.75" from right edge of piece and 1.625" from bottom. NOTE: font and font size, the number of address lines in the data and other printing on the mail piece ALL affect how much space is needed. There is no 'one answer' that covers everything. The maximum number of address lines that this clear space will accommodate would be the Intelligent Mail barcode plus 7 lines of text using the Arial font at 9 points. The seven lines of text includes one line for the optional endorsement, so 6 lines are available for the address.

HOW TO CREATE A PURCHASE ORDER FOR PRINTED OUT MATERIALS AND SUPPLIES

1. Quote request
    a. Determine best vendor: Jet, Hadley, Springfield Printing
        i. Think about client
    b. Email request, include turnaround time
2. Evaluate quotes
    a. Price, reliability, quality, turnaround time
3. Create Purchase Order in MailShop
    a. If similar to previous order, copy purchase order and make necessary changes
    b. Create new purchase order
        i. "Create PO" from Work Order screen in MailShop
        ii. Go to "Purchase Orders" and create
    c. General Tab:
        i. Vendor
        ii. Vendor Contact
        iii. Order # (work order)
        iv. Ordered by
        v. Terms
        vi. Contact Name
        vii. Overs
        viii. Ship Date (expected delivery date)
        ix. Comments section:
            1. Proof required prior to printing. (Specify PDF or physical proof.)
            2. Type of file supplied. (Hi-res PDF, InDesign file, etc.)
    d. Items Ordered Tab:
        i. Item Name (Example: Project Bread Letterhead)
        ii. Previous Order # (Use this if it's an exact reprint -- helpful for vendors to reference their previous order)
        iii. Vendor Quote #
        iv. Quantity
        v. Specs (size, stock, color)
        vi. Select price per thousand or price per each
        vii. Qty
        viii. Unit Price
        ix. Materials In date
        x. Verify total price is correct
    e. Shipping/Billing tab:
        i. Ship To & Bill To are pre-populated
        ii. Select shipping method (Ship Via)
    f. Print

    i. Landscape or portrait?

g. Put copy of PO in job bag, save PDF to job folder on L Drive, email PDF to vendor with print file
h. Ask vendor to confirm receipt of PO
i. On work order in print department
    i. Enter quantity printed
    ii. In Description: PRINT OUT w/ specs
    iii. Include PO #
    iv. Per piece price
j. Day before expected delivery, follow up with vendor to confirm

BILLING AND JOB BAG ORGANIZATION

1. Work Order: Check pricing and quantities indicated per function to Five Maples Price List.

Data Processing:

- NCOA per piece quantity should be written in by DP after the NCOA. It should be compared to the NCOA paperwork saved to the job folder on the L drive, “Data Services Processing Certificate,” at the bottom of the “Total” column.
- CASS quantity should be written in by DP after CASSing. It should be compared to the CASS Summary Report saved to the job folder on the L drive- in section B, box 6 “Total Records Submitted for Processing.” *If total quantity under 10K, quantity should remain “1” and Cost “37.5”
- Dedupe Quantity is found on the Dedupe Paperwork on “Pre-Dedupe” page, “Total Records Processed.” If total quantity under 10K, quantity should remain “1” and Cost “65”
- Postal Presort quantity is found on Postal One Receipt- “Mailer Declared Total Pieces.” If total quantity under 10K, quantity should remain “1” and Cost “40”
- MERGE print quantities should match the total corrected quantity (Mail quantity) at the top of the consolidated WO. Cost should be calculated using the “Print Pricing Estimator” sheet.

Lettershop:

- Lettershop quantities should match the total corrected quantity (MAIL QTY), unless there is foreign that is being processed separately from domestic. Then lettershop quantities should match total domestic quantities from the postal one receipt.

Fulfillment:

- If Supplies are purchased for the job (Boxes, bubble wrap, etc.), multiply total cost of materials (including shipping) by 1.3.

Print:

- Static print quantities should match the total corrected quantity (Mail quantity) at the top of the consolidated WO, unless another specified amount was instructed to print. Cost should be calculated using the “Print Pricing Estimator” sheet. DO NOT include shrink quantities.
- Fold quantities should also match the total mail quantity, unless there was another specified amount.
- Print OUT: Refer to Invoice from the outsourced printer. Multiply total cost of printing (including shipping) by 1.3. Divide that number by quantity printed for a per piece price for WO

Foreign:

- 1-5 Pieces: Set Up/Processing fee of $5. This fee covers all other foreign service codes EXCEPT Applying foreign stamps and Mail Foreign/Canadian
- 5-24 Pieces: Set Up/Processing fee of $1 per record. This fee covers all other foreign service codes EXCEPT Applying foreign stamps and Mail Foreign/Canadian
- 25+ Pieces: Set Up fee of $25. Process Foreign service code used if not processed same as domestic- indicate # of foreign mailed, Cost $0.14/pc
- If mailing via ISAL: Indicate Canadian and Foreign quantities separately. Use appropriate postage rate based on weight.

2. Check to see if "Bill postage with processing" is on WO, if applicable
3. Formal Estimate OR print pricing estimator sheet
4. Postage Estimate Invoice (if one was created)
5. Postal One Receipt
   - Highlight mail quantity (Mailer declared total pieces)
   - Highlight Postage (Total adjusted postage)
6. Postal Statement (3602)
7. NDC/SCF (if applicable): GEO section at top of consolidated WO will indicate if an NDC/SCF was taken

   IF CLIENT KEEPS THE SAVINGS:
   - Highlight postal one receipt as usual
   - Check NDC/SCF paperwork to see how many NDCs or SCFs
   - Check Bill of Lading to see how many pallets shipped
   - Check FM price list to determine what cost to put in DP ("SCF/NDC Processing (FOR BILLING ONLY")) & Warehouse ("Deliver to: NDC/SCF") sections of consolidated WO

   IF FM KEEPS THE SAVINGS:
   - Circle postage cost & quantity on NDC/SCF paperwork. Write "USE THIS" next to circled amount and "NOT THIS" on Postal One Receipt
   - include Bill of Lading
8. Foreign Work Order (if applicable)
   - international weigh bills
   - Production sample (if included)
9. PO (CLIENT PO, if applicable. Ensure client PO # is on work order)
10. PAF (if there is one)
11. Print WO: Staple all items related to Print WO together
    - FM PO if applicable
    - Print pricing estimate (if static)
    - FINAL static proofs & emails (throw away or save samples)
12. Client Services WO: Staple all items related to CS WO together
    - with proofs & emails
13. FINAL production piece
14. DP items
    - worksheet
    - dedupe
    - list emails / paperwork (label lists)
    - Print pricing estimate (if merge related)
15. DP Merge proofs (stapled together)
16. Lettershop- proofs and emails.
17. Project Manager materials
    - emails
    - customer approvals

18. Warehouse sheets. Placed in job bag FACING BACKWARD

HOW TO CREATE AN ESTIMATE IN MAILSHOP

1. Click on Estimates
2. Add New Estimate
3. Fill in the following fields:
    - Customer – This field will auto populate. However, if person requesting quote is not a Customer, there are two options:
        - Fill in Customer name, click enter and choose "Add New Customer"
        - Make the customer field equal "New Project Quote"
    - Contact – this should be the person who is requesting the quote from you
    - Sales Rep, CSR, Entered By – Make these all your initials
    - Project – This should be a description of the project or an exact name of the project. For example: 10,000 brochures in #10 envelope OR 2017 Spring Appeal
4. Enter Quantity (Update Quantity is used for Copy Estimates)
5. Comments
    - Copy & Paste the Standard Estimate Comments from WIKI – this should be used for all estimates
    - Edit and remove fields based on job specs
    - Always include MAIL FILE section and TERMS as is
6. Navigate each tab and enter service codes as if you were creating a Work Order
    - Details do not show up on estimate so you must to write information in the Description Line if not in the Estimate Comments.
    - Details do export to order, so it is important to complete the wizards.
    - POSTAGE TAB: only the "Postage Estimate" section is required.
7. "Print Menu" tab
    1. Choose Estimate – Standard
    2. Preview
    3. Print > Adobe PDF
    4. Save Estimate in Client Root Quotes/Estimates Folder
        i. Estimate [#####] - [Project Name]

ESTIMATE REVIEW PROCESS

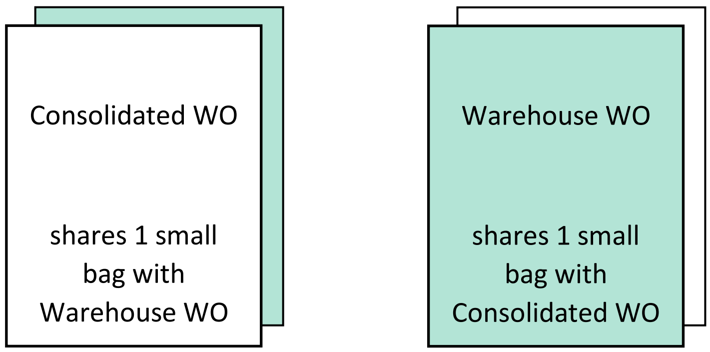
NOTE: If an estimate is more than $1000 or more, bring to Supervisor for review before sending to client

- Total **does** include handwork
- Total **does not** include postage

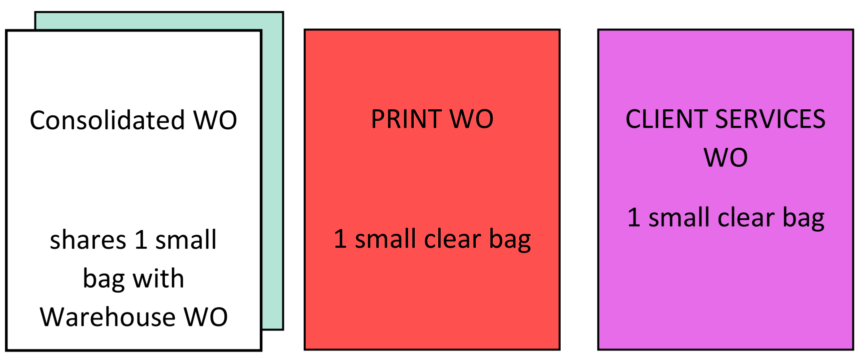
Work Order Bag Organization

- Each Work Order that you print from the "Print Menu" in Mail Shop – *Consolidated, Foreign, Print, Client Services* – go into their own individual clear job bag (small bag).

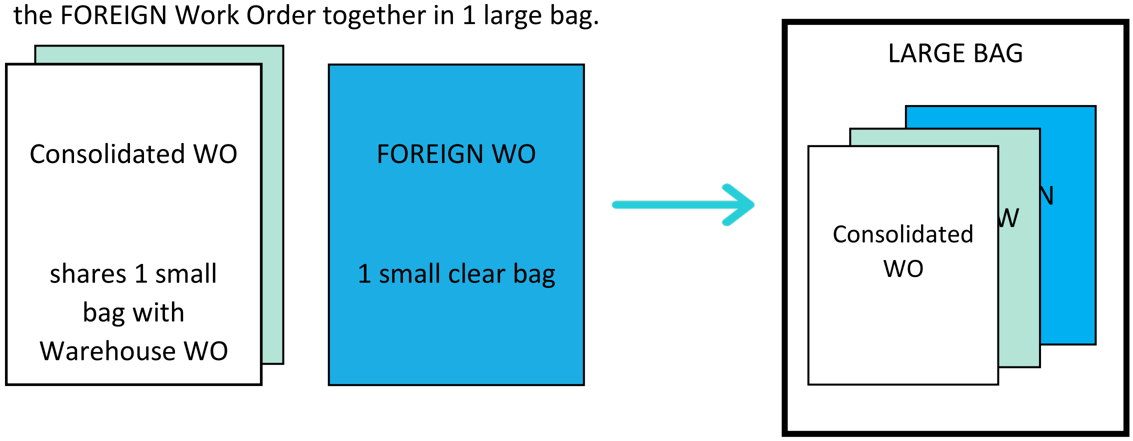
- EXCEPTION: The **WAREHOUSE** Work Order does not go in an individual clear bag. Instead, it goes in reverse behind the **CONSOLIDATED** Work Order in one shared bag.



- If you have a **PRINT** or **CLIENT SERVICES** Work Order, each will go in a separate clear bag when you put the Work Order forward.

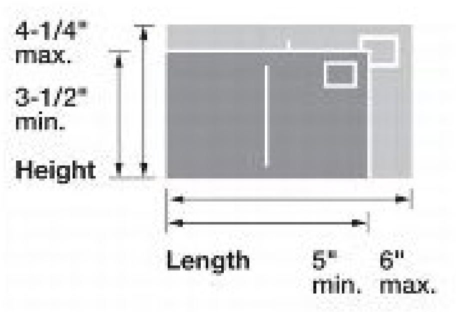


- Only when you have a **FOREIGN** Work Order, will you put the CONSOLIDATED Work Order and the FOREIGN Work Order together in 1 large bag.



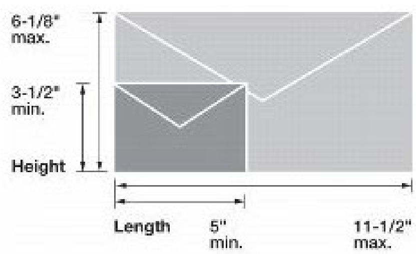
Common MAIL PIECE TYPES and dimensions

Click here to learn about Self-Mailers and Booklets **in this document.**



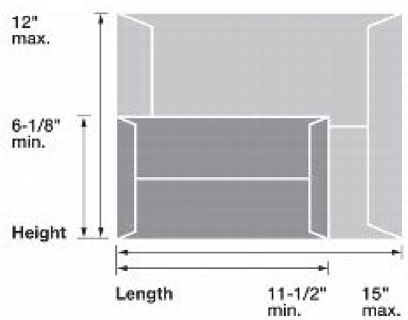
POSTCARD

	Minimum	Maximum
Length	5 inches	6 inches
Height	3 ½ inches	4 ¼ inches
Thickness	.007 inch	.016 inch



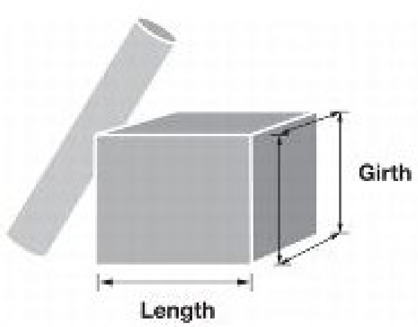
LETTER

	Minimum	Maximum
Length	5 inches	11.5 inches
Height	3.5 inches	6 1/8 inch
Thickness	.007 inch	¼ inch



FLAT

	Minimum*	Maximum
Length	11 1/2 inches	15 inches
Height	6 1/8 inches	12 inches
Thickness	¼ inch	¾ inch
*Flats exceed at least one of these dimensions		



PARCEL

Length	The longest side of the parcel
Girth	Measurement around the thickest part
Length + Girth	Cannot exceed 108 inches

Other Important Information:

Stamp Purchase Order

Stamp PO's should be created when the quantity of stamps needed exceeds:

- 8,000 stamps for - Precancelled STD, STD NP & FC
- 1,000 stamps for - Retail First Class
- 200 stamps for - Global Foreign
- All other stamp denominations require a PO regardless of the quantity

This form is located on the L Drive (named: Stamp Requirement Form). Fill out the form. Make a copy and put it in the job bag. Place the original in the "Out the Production" bin.

What does Copy Order mean?

If a new Work Order seems similar to a previous order, you can "Copy Order" a previous Work Order and make necessary changes. This process is quick and many Project Managers use this method of creating work orders. However, it is very important to double check your work and make sure all necessary changes have been made. Many mistakes can be made during "Copy Order."

Work Order Checklist

The Work Order Checklist is a valuable tool that prompts many questions that reduces errors and rework down the line. Find the form Work Order Check List 5-4-15.docx on the L Drive.

PIP Procedures

- PIP stands for "Person in Putney," a designated PM who assists the remote PM with procedures and work flow.
- While the PIP does handle some aspects of the remote PM's workload, it is important to remember that the PIP is NOT primarily responsible for the work orders, their content, or any questions that may arise.
- The PIP's role is to assemble all the elements of the remote employee's work order and put WOs forward, to send necessary pieces of the WO to the remote employee for billing upon completion of a job, assist with lettershop proofing, and various other tasks that require a physical presence.
- **See the Wiki Entry on PIP Procedures to learn more.**

Common Envelope Names and Sizes

6 ¾	3.625" x 6.5" (3⅝" x 6½")
A7	5.25" x 7.25" (5¼" x 7¼")
#9	3.875" x 8.875" (3⅞" x 8⅞)
#10	4.125" x 9.5" (4⅛ x 9½)
6 x 9	6" x 9"
6½ x 9½	6.5" x 9.5" (6½" x 9½")
9 x 12	9" x12"
10 x 13	10" x 13"

Impact jobs

What qualifies as an impact job?

- 10,000+ pieces
- or anything that will be labor intensive

What information should I know for the morning meeting?

- Qty
- Job/Client
- Target mail date
- Materials information

QuickBooks, Hightail, Asana, Zoho

Rental Lists

RTC Work Order

Saturation Mailings

Creative Services

L Drive File Structure