



5563 Calle Ocho
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408-666-7356
jim@carpedata.com
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Mailing Workflow in JOBZ!

The following pages illustrate the various documents that JOBZ! can produce when a project involves mailing. At each step of the normal workflow, a user can access a screen designed to automate the entry of information related to mailing.

For example, when requesting an estimate, the user checks the items necessary for an estimator to prepare a mailing estimate. Later in the workflow, more specific information can be added. The RFE (Request for Estimate) and SOP (Sales Order to Production) automatically contain the entered mailing information. There are several options for presenting the information to the customer. At all stages of the workflow, various documents can be output as needed, such as a separate Mailing Order Entry, a Confirmation of Order, or a Proposal Mailing Attachment with detailed line-by-line costs.

All of the documents are sent directly from JOBZ! as PDF's attached to emails, and saved in the user's preferred location for future reference.

Following this page, please see such documents as the RFE, a Dummy Request, a Proposal with Mailing Attachment, the SOP, Mailing Order Entry, Confirmation of Order, and an Invoice Draft.

Example of the data entry screen just prior to producing the Sales Order to Production:

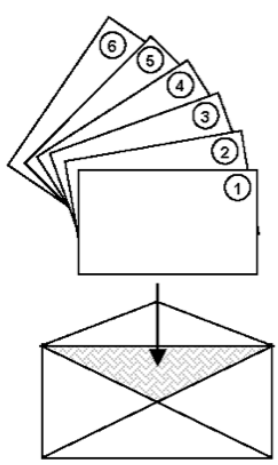
SPEX	QUOTE	ORDER	SCHEDULE	AC'S	INVOICE	ADMIN	HELP
1	2	3	4	+ Mail	S	\$	O

11 by Seventeen - Solid Rock - Example of a Job

Mailing For items requiring quantification [:] make the selections, then select Other... to quantify.

Order Qty	Mailing Qty	Done	Postage Estimate	Postage Each	Postage Due
75,000	74,000		\$33,300.00	\$0.4500	6/7/2017

Handling	Data	Finishing	Addressing	Inserting	Dates	Drop Ship	\$
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Insert #	1						
Spine	last						
Face	up						
Size	3.7x8.5						
Part #	183						
Rev #	A						

☐ Envelope size:
☐ # Inserts per package:
☐ Insert into booklet envelope (open side)
☐ Insert into catalog envelope (open end)
☐ Nest into another piece
☐ Polybag /polywrap
☐ Shrinkwrap

☐ Match 1 insert to address
☐ Match 2 inserts to address
☐ Match 3 inserts to address
☐ Blind match

Other...

Envelope size: #10
Inserts per package: 1
Insert into envelope

Cancel OK

New Request

From: Jim Taylor JOBZ! by Carpe Data Customer: 11 by Seventeen Al Gorithm 408-666-7356  Cust.#: 36805	Due: 5/11 Plant: NY W Type: New Job Prev: 60933	Files 5/30/17 Proofs 6/2/17 Press 6/5/17 Ship 6/9/17 1st Deliv 6/10/17 1st Deliv Qty 1,000 First In Home 6/13/17
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Title		Part# 183
Description	Example of a Job with Mailing	
Notes	Specifications, once entered, are recycled throughout the project's life. This job displays the mailing capabilities in JOBZ!, which appear on the Request for Estimate, on the Proposals and the Work Order (Sales Order to Production.)	
Size	3-11/16 x 8-1/2"	
Envelope	Print & Convert standard #10	
Brochure	Centura Dull 100# Book 5/5 = 4C Process + SGV (medium coverage)	
Envelope	60# Cougar Opaque Offset 4/0: 4C Process (Light Coverage 5% - 40%)	
Proofs Furnished	Epson digital color proof & digital dylux proof Layout files and lasers Files with high resolution images in position	
Finishing	Brochure scored, trimmed & folded (folder score) Insert brochure into envelope and mail. Store Copies do not insert, carton pack convenient	
Packaging Freight	Except for store copies, none required; prepare to mail FOB Origin Freight Additional	
Notes	These notes appear on the RFE and the Proposal	

(+/- 2%)	Quantity	45,000	55,000	75,000	90,000	100,000	120,000
Customer Samples	100						
Press Approval	Customer & Rep						
Screen	133						
The Competition	Nemesis Printing						
Estimating Note	This is a short note to the estimator, and appears only on the RFE (Request for Estimate)						
Production Note	This is a short note to the CSR/Planner on the job, and will appear only on the RFE (Request for Estimate) and on the SOP.						

Mailing Specifications:

Permit Imprint
First Class Mail
Presorted
Nation-wide mailing
NCOA (National Change of Address)
Suppress against DMA opt out list
PDF soft proof
Ink jet address/ 1" Printhead
Apply indicia with ink jet
Envelope size: #10
Inserts per package: 1
Insert into envelope

Brochures Joan Baez
Est# 01-4154 Job# 10220-17 Record # 01-4154
5/16/2017 12:53:50 PM



5563 Calle Ocho
Carpinteria CA 93013
408-666-7356
jim@carpedata.com
http://www.carpedata.com

Dummy Request

Sales: Jim Taylor

Est# 01-4154 Job# 10220

May 16, 2017



Title	Solid Rock	Part# 183
Description	Example of a Job with Mailing	
Notes	Specifications, once entered, are recycled throughout the project's life. This job displays the mailing capabilities in JOBZ!, which appear on the Request for Estimate, on the Proposals and the Work Order (Sales Order to Production.)	
Size	3-11/16 x 8-1/2"	
Envelope	Print & Convert standard #10	
Brochure	Centura Dull 100# Book 5/5 = 4C Process + SGV (medium coverage)	
Envelope	60# Cougar Opaque Offset 4/0: 4C Process (Light Coverage 5% - 40%)	
Finishing	Brochure scored, trimmed & folded (folder score) Insert brochure into envelope and mail. Store Copies do not insert, carton pack convenient	
Notes	For Postage Estimate	
Ship to	Sales Rep Jim Taylor 5563 Calle Ocho Carpinteria CA 93013 408-666-7356 jim@carpedata.com http://www.carpedata.com	Copy to ☒ Customer Al Gorithm 11 by Seventeen 5563 Calle Ocho Carpinteria, CA 93013 USA 408-666-7356 ☐ Production

Proposed Schedule	Files	Proofs	Press	First In	Ship
	May. 30	Jun. 2	Jun. 5	Jun. 13	Jun. 9



5563 Calle Ocho
Carpinteria CA 93013
408-666-7356
jim@carpedata.com
http://www.carpedata.com

May 16, 2017 Est# 01-4154 Job# 10220-17
support@carpedata.com 408-666-7356

Proposal For: AI Gorithm, 11 by Seventeen

Title	Solid Rock	Part# 183
Description	Example of a Job with Mailing	
Notes	Specifications, once entered, are recycled throughout the project's life. This job displays the mailing capabilities in JOBZ!, which appear on the Request for Estimate, on the Proposals and the Work Order (Sales Order to Production.)	
Size	3-11/16 x 8-1/2"	
Envelope	Print & Convert standard #10	
Brochure	Centura Dull 100# Book 5/5 = 4C Process + SGV (medium coverage)	
Envelope	60# Cougar Opaque Offset 4/0: 4C Process (Light Coverage 5% - 40%)	
Proofs Furnished	Epson digital color proof & digital dylux proof Layout files and lasers Files with high resolution images in position	
Finishing	Brochure scored, trimmed & folded (folder score) Insert brochure into envelope and mail. Store Copies do not insert, carton pack convenient	
Packaging Freight	Except for store copies, none required; prepare to mail FOB Origin Freight Additional	
Notes	These notes appear on the RFE and the Proposal	

(+/- 2%) Quantity	<u>45,000</u>	<u>55,000</u>	<u>75,000</u>	<u>90,000</u>	<u>100,000</u>	<u>120,000</u>
Price	\$21,212.00	\$25,667.00	\$34,650.00	\$41,164.00	\$45,280.00	\$53,793.00
Each	\$0.47138	\$0.46667	\$0.462	\$0.45738	\$0.4528	\$0.44828
+ Mailing	\$2,134.00	\$2,789.00	\$3,456.00	\$4,657.00	\$5,431.00	\$5,987.00
+ Postage	\$20,250.00	\$24,750.00	\$33,750.00	\$40,500.00	\$45,000.00	\$54,000.00
Total	\$43,596.00	\$53,206.00	\$71,856.00	\$86,321.00	\$95,711.00	\$113,780.00

Thank you,

	Files	Proofs	Press	First In	Ship
Proposed Schedule	May. 30	Jun. 2	Jun. 5	Jun. 13	Jun. 9

Accepted by: AI Gorithm for 11 by Seventeen X Date

Terms of Sale: C.O.D. or Net 30 days on approved credit. The attached terms & conditions are a material part of this quotation and include a limited warranty, disclaimers of warranties, and a limitation of customer's damages and remedies. Acceptance of this offer shall include acceptance of all of the terms & conditions. All applicable taxes will be added to the prices herein. Prices are subject to change based on availability of materials, press time and current price of paper. Quotations over 30 days old are subject to review. Record # 01-4154

Jim Taylor
JOBZ! by Carpe Data



5563 Calle Ocho
Carpinteria CA 93013
408-666-7356
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http://www.carpedata.com

Al Gorithm
11 by Seventeen
5563 Calle Ocho
Carpinteria, CA 93013 USA

May 16, 2017
408-666-7356
support@carpedata.com
Est# 01-4154 Job# 10220-17
PO No. To Come

Job Title: Solid Rock Part# 183

Mailing Specifications:

	Description	Rates
Permit Imprint	Data Processing	\$100.00 /Hr.
First Class Mail	Programming	\$110.00 /ea.
Presorted	Inserting	\$15.00 /M
Nation-wide mailing	Merge	\$2.50 /M
NCOA (National Change of Address)	Purge	\$2.50 /M
Suppress against DMA opt out list	Mail Sort	\$2.50 /M
PDF soft proof	Ink Jet Setup	\$110.00 /ea.
Ink jet address/ 1" Printhead	Mail Basic	\$15.00 /M
Apply indicia with ink jet		
Envelope size: #10		
# Inserts per package: 1		
Insert into envelope		

Thank you,

Jim Taylor
JOBZ! by Carpe Data

Quotes will be honored for 30 days from the date of the quote unless otherwise noted. Quotes do not include postage unless otherwise noted. Postage rates are used for estimating purposes only and are subject to final USPS approval at the time of mail drop. We will not be responsible for postage penalties or surcharges incurred as a result of move update noncompliance if we are not authorized by the customer in writing for move update services. Further, we will not be responsible for postage penalties or surcharges incurred for any issue beyond the scope of the services provided. Postage is due at least 48 hours prior to mail drop unless otherwise noted. If using our permit imprint, please make check payable to us unless otherwise noted. Our mailing services liability is limited to the replacement, reworking, re-mailing, or refunding of the purchase price of a mailing order. We will not be liable for any damages, real or perceived, for consequential damages such as lost profits, response rates, postage, etc. We acknowledge that data and other intellectual property provided to us by the customer are solely to be used for the duration and scope of this project unless otherwise noted. Final data content is the responsibility of the customer. Data will be kept secure and will not be released to any other party unless requested in writing from the customer. As a service, we may provide mailing lists but assume no responsibility for the accuracy, contents, or deliverability of the addresses shown on such lists.

SALES ORDER TO PRODUCTION 4/20/2009NY W Brochures Patsi Cline
Record # 01-4154 5/16/2017 12:56:31 PM

Sales Rep: Jim Taylor Customer #: 36805 Customer: 11 by Seventeen Al Gorithm 408-666-7356 	Job: 10220-17 Est: 01-4154 PO: To Come Type: New Job Prev: 60933	<table><tr><td>Files</td><td>5/30/17</td></tr><tr><td>Proofs</td><td>6/2/17</td></tr><tr><td>Press</td><td>6/5/17</td></tr><tr><td>Ship</td><td>6/9/17</td></tr><tr><td>1st Deliv</td><td>6/10/17</td></tr><tr><td>1st Deliv Qty</td><td>1,000</td></tr><tr><td>First In Home</td><td>6/13/17</td></tr></table>	Files	5/30/17	Proofs	6/2/17	Press	6/5/17	Ship	6/9/17	1st Deliv	6/10/17	1st Deliv Qty	1,000	First In Home	6/13/17
Files	5/30/17															
Proofs	6/2/17															
Press	6/5/17															
Ship	6/9/17															
1st Deliv	6/10/17															
1st Deliv Qty	1,000															
First In Home	6/13/17															

Title	Solid Rock	Part# 183
Description	Example of a Job with Mailing	
Notes	Specifications, once entered, are recycled throughout the project's life. This job displays the mailing capabilities in JOBZ!, which appear on the Request for Estimate, on the Proposals and the Work Order (Sales Order to Production.)	
Size	3-11/16 x 8-1/2"	
Envelope	Print & Convert standard #10	
Brochure	Centura Dull 100# Book	
Envelope	5/5 = 4C Process + SGV (medium coverage)	
Envelope	60# Cougar Opaque Offset	
Envelope	4/0: 4C Process (Light Coverage 5% - 40%)	
Proofs Furnished	Epson digital color proof & digital dylux proof Layout files and lasers Files with high resolution images in position	
Finishing	Brochure scored, trimmed & folded (folder score) Insert brochure into envelope and mail. Store Copies do not insert, carton pack convenient	
Packaging Freight	Except for store copies, none required; prepare to mail FOB Origin Freight Additional	

To Schedule:
Litho
Mailing
Ink Jet

	Order Quantity (+/- 2%)	Selling Price	Cost	Sell @
	75,000	\$34,650.00	\$34,649.80	100.0%
		\$462.0000 /M		
Press Approval	Customer & Rep			
Match Color To Screen	Color Proofs, Ink Drawdown, Previous OK 133 Proof Turnaround Same Day			
Production Note	This is a short note to the CSR/Planner on the job, and will appear only on the RFE (Request for Estimate) and on the SOP.			

Mailing Specifications:

Permit Imprint
First Class Mail
Presorted
Nation-wide mailing
NCOA (National Change of Address)
Suppress against DMA opt out list
PDF soft proof
Ink jet address/ 1" Printhead
Apply indicia with ink jet
Envelope size: #10
Inserts per package: 1
Insert into envelope

DELIVERY INSTRUCTIONS 11 by Seventeen - Solid Rock

Customer: 11 by Seventeen
Job Title: Solid Rock Part# 183

Est #: 01-4154
Job #: 10220-17
Record #: 01-4154
PO #: To Come

Rep: Jim Taylor
Date: May 16, 2017

Sales Samples: 15 Samples to Sample Room **Customer Samples:** 100

General Delivery Notes: Cartons need to be less than 40#

Order Qty: 75,000 (+/- 2%)
Destined: 75,000
Difference: 0

Customer Contact:

11 by Seventeen
Al Gorithm
5563 Calle Ocho
Carpinteria CA 93013 USA
408-666-7356

Proofs ATTN:

Database Testing, Inc.
Rich Text
1999 S. Bascom Ave. Ste 400 5th Floor San Jose CA 93013
408-666-7356 support@carpedata.com

Invoice ATTN:

Otto Correct
11 by Seventeen
5563 Calle Ocho
Carpinteria CA 93013 USA

Samples & Delivery Destinations:

100 Samples Ship: 6/9/2017 Due: 6/9/2017 Via: Sales Rep

11 by Seventeen
Al Gorithm 408-666-7356
5563 Calle Ocho
Carpinteria CA 93013 USA

1000 Store Copies Ship: 6/9/2017 Due: 6/10/2017 Via: Messenger

11 by Seventeen
Central Receiving 408-666-7356
1536 Valley Parkway
Stockton CA 97524

Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Central Receiving.

74000 Qty.

To Mail

Mailing Order Entry

NY Patsi Cline

Proj.# 01-4154 5/16/2017 1:42:27 PM

Sales Rep: Jim Taylor
Invoice Cust #: 36805**Mail Est:** 5464**Job:** 10220-17**Cost:** \$2,414.00**Est:** 01-4154**Sell:** \$3,195.00**PO:** To Come

132%

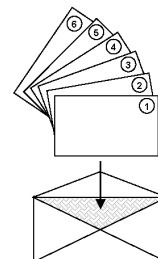
Type: New Job**Prev:** 60933**Customer:** 11 by Seventeen
Al Gorithm
5563 Calle Ocho
Carpinteria CA 93013 USA
408-666-7356**Job Title:** Solid Rock Part# 183**Total Mailing Qty.** 74,000**Postage Estimate:** \$33,300.00 \$0.4500**Specifications:**Permit Imprint
First Class Mail
Presorted
Nation-wide mailing
NCOA (National Change of Address)
Suppress against DMA opt out list
PDF soft proof
Ink jet address/ 1" Printhead
Apply indicia with ink jet
Envelope size: #10
Inserts per package: 1
Insert into envelope

Mail Files From Customer	Mon Jun 5
Postage	Wed Jun 7
Press	Mon Jun 5
Ink Jet	Fri Jun 9
First In Home	Tue Jun 13
First Drop Qty	10,000
Last In Home	Fri Jun 16
Ship	Fri Jun 9
1st Deliv	Sat Jun 10
1st Deliv Qty	1,000

Important notes about the schedule. A schedule for job with Mailing can include dates for: List Purchase, Mail Files, Postage, Ink Jet, First and Last In-Home.

Job Specifications**Title** Solid Rock 183**Description** Example of a Job with Mailing**Notes** Specifications, once entered, are recycled throughout the project's life. This job displays the mailing capabilities in JOBZ!, which appear on the Request for Estimate, on the Proposals and the Work Order (Sales Order to Production.)**Size** 3-11/16 x 8-1/2" **Envelope** Print & Convert standard #10**Brochure** Centura Dull 100# Book 5/5 = 4C Process + SGV (medium coverage)**Envelope** 60# Cougar Opaque Offset 4/0: 4C Process (Light Coverage 5% - 40%)**Proofs** Epson digital color proof & digital dylux proof**Furnished** Layout files and lasers Files with high resolution images in position**Finishing** Brochure scored, trimmed & folded (folder score) Insert brochure into envelope and mail. Store Copies do not insert, carton pack convenient**Packaging & Freight** Except for store copies, none required; prepare to mail FOB Origin Freight Additional**Inserting Order:**

Insert #	1					
Spine	last					
Face	up					
Size	3.7x8.5					
Part #	183					
Rev #	A					





5563 Calle Ocho
Carpinteria CA 93013
408-666-7356
jim@carpedata.com
http://www.carpedata.com

May 16, 2017 Job# 10220-17 PO No. To Come
support@carpedata.com 408-666-7356

Confirmation For: **Al Gorithm, 11 by Seventeen**

Title Solid Rock Part# 183

Mailing Qty. 74,000

<u>Schedule</u>			<u>Description</u>		<u>Total</u>
Mail Files From Customer	Mon Jun 5	2	Data Processing	\$100.00 /Hr.	\$200.00
Postage	Wed Jun 7	1	Programming	\$110.00 /ea.	\$110.00
Press	Mon Jun 5	74,000	Inserting	\$15.00 /M	\$1,110.00
Ink Jet	Fri Jun 9	74,000	Merge	\$2.50 /M	\$185.00
First In Home	Tue Jun 13	74,000	Purge	\$2.50 /M	\$185.00
First Drop Qty	10,000	74,000	Mail Sort	\$2.50 /M	\$185.00
Last In Home	Fri Jun 16	1	Ink Jet Setup	\$110.00 /ea.	\$110.00
Ship	Fri Jun 9	74,000	Mail Basic	\$15.00 /M	\$1,110.00
1st Deliv	Sat Jun 10				
1st Deliv Qty	1,000				\$3,195.00

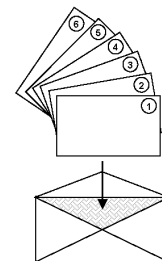
Important notes about the schedule. A schedule for job with Mailing can include dates for: List Purchase, Mail Files, Postage, Ink Jet, First and Last In-Home.

Postage Estimate:
\$33,300.00
\$0.4500

Specifications:

Permit Imprint
First Class Mail
Presorted
Nation-wide mailing
NCOA (National Change of Address)
Suppress against DMA opt out list
PDF soft proof
Ink jet address/ 1" Printhead
Apply indicia with ink jet
Envelope size: #10
Inserts per package: 1
Insert into envelope

Jim Taylor
JOBZ! by Carpe Data



Inserting Order:

Insert #	1				
Spine	last				
	up				
Face	3.7x8.5				
Size	183				
Part #	A				

Rev

Quotes will be honored for 30 days from the date of the quote unless otherwise noted. Quotes do not include postage unless otherwise noted. Postage rates are used for estimating purposes only and are subject to final USPS approval at the time of mail drop. We will not be responsible for postage penalties or surcharges incurred as a result of move update noncompliance if we are not authorized by the customer in writing for move update services. Further, we will not be responsible for postage penalties or surcharges incurred for any issue beyond the scope of the services provided. Postage is due at least 48 hours prior to mail drop unless otherwise noted. If using our permit imprint, please make check payable to us unless otherwise noted. Our mailing services liability is limited to the replacement, reworking, re-mailing, or refunding of the purchase price of a mailing order. We will not be liable for any damages, real or perceived, for consequential damages such as lost profits, response rates, postage, etc. We acknowledge that data and other intellectual property provided to us by the customer are solely to be used for the duration and scope of this project unless otherwise noted. Final data content is the responsibility of the customer. Data will be kept secure and will not be released to any other party unless requested in writing from the customer. As a service, we may provide mailing lists but assume no responsibility for the accuracy, contents, or deliverability of the addresses shown on such lists.



Carpe Data
5563 Calle Ocho
Carpinteria CA 93013

Otto Correct
11 by Seventeen
5563 Calle Ocho
Carpinteria CA 93013 USA

Date: June 15, 2017
Invoice #
Purchase Order # To Come
Our Job # Est# 01-4154 Job# 10220-17
Sales # 01
Customer # 36805

INVOICE DRAFT

75,000 Solid Rock Part# 183
Example of a Job with Mailing

Notes Specifications, once entered, are recycled throughout the project's life. This job displays the mailing capabilities in JOBZ!, which appear on the Request for Estimate, on the Proposals and the Work Order (Sales Order to Production.)

75,000 Copies as quoted @ \$34,650.00

+ Mailing \$3,195.00

Subtotal \$37,845.00

Invoice Total \$37,845.00

Terms of Sale: C.O.D. or Net 30 days on approved credit.

Invoice comments area; instructions about billing the job.



Mailing Workflow Help

Finally, there is an extensive series of HELP screens in JOBZ! that provides a complete tutorial in selling mailing, and a number of quick references. For example:

Go To Mailing & Envelope Help

Mailing Workflow Mailing Terminology Commercial Envelopes Announcement Envelopes Catalog Envelopes Booklet Envelopes

Also called business, standard, or officials, these are open side envelopes usually with commercial style flaps and diagonal seams although some sizes come with side seams and square or pointed flaps. The Monarch is a variation of the #7 $\frac{3}{4}$ envelope but with pointed flap. The window version has single or double windows that allow addresses to show through the face of the envelope. They are normally used for invoices or billing statements, paychecks and receipts.

The following list shows the name/number designation, envelope dimensions, and approximate maximum enclosure dimensions for some of the more common sizes of this envelope style. Actual dimensions for enclosures will depend on the thickness of the enclosure (paper thickness, number of pages).

#5
5.5 x 3.0625
5.25 x 2.8125

#6
6 x 3.375
5.75 x 3.125

#6 $\frac{1}{4}$
6 x 3.5
5.75 x 3.25

#6 $\frac{1}{2}$
6.25 x 3.5625
6 x 3.3125

#6 $\frac{3}{4}$
6.5 x 3.625
6.25 x 3.5

