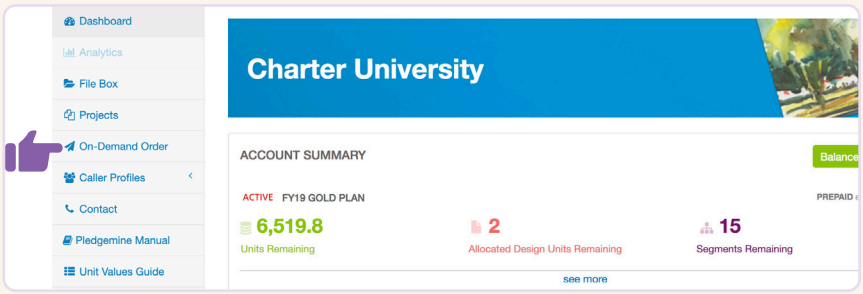
evertrue | Pledgemine

Uploading a New Data File

Pledgemine Dashboard

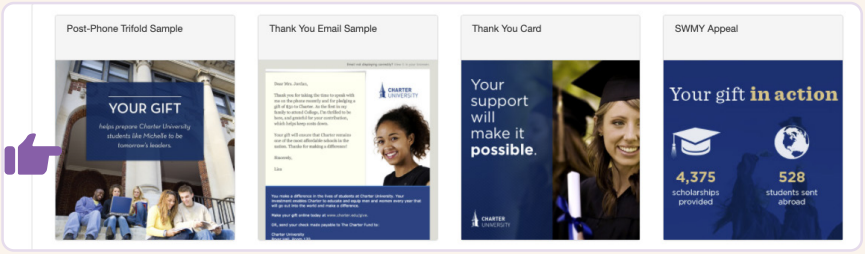
You can use your Dashboard to keep track of your plan usage, postage balance, and pieces mailed.

To start a new mailing using an approved on-demand design, chose **"On-Demand Order"** in the left menu on your Dashboard.



Select Your Project

Click on the appropriate on-demand project.



Uploading Your Data Steps 1-7

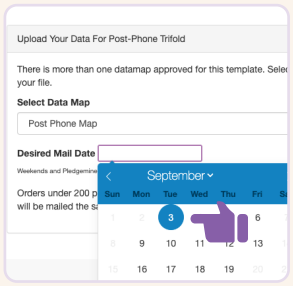
1 MAP

Choose your data map (if applicable)



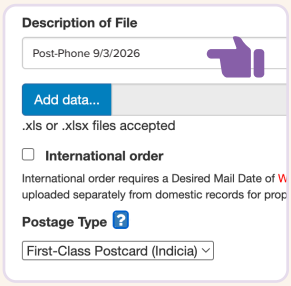
2 MAIL DATE

Select your mail date (*optional)



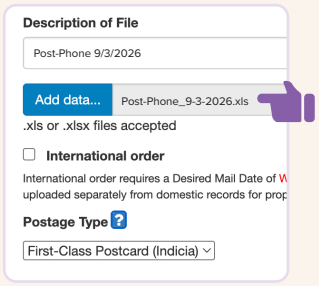
3 DESCRIPTION

Add a file description



4 DATA FILE

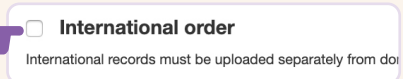
Choose your data file



*This is the date you would like the order to leave our facility. If you would like your order released as soon as possible, leave the default date, which is our next business day. Please note, not all requested mail dates may be possible due to order size.

5 INTERNATIONAL ORDER

If applicable



All international records must be in their own file, separated from domestic records. Select the checkbox "international order" if you are uploading international records. International orders are released once a week, typically on Wednesdays.

6 POSTAGE TYPE

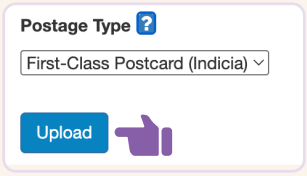
Select postage type



The default postage type will be displayed. The drop-down menu will show only the available postage options for the selected mailer. Click the ? if what you're looking for is not displayed. **If you choose a different postage type, the change will be applied to both the proofer and your order.**

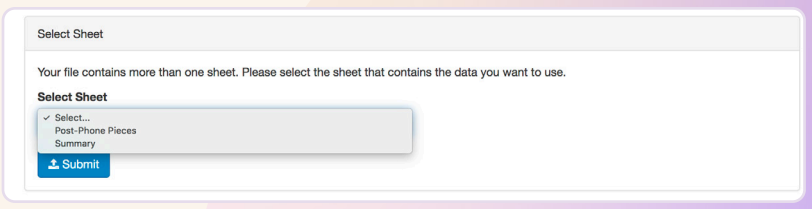
7 UPLOAD

Click "Upload" to complete



Multiple Sheets

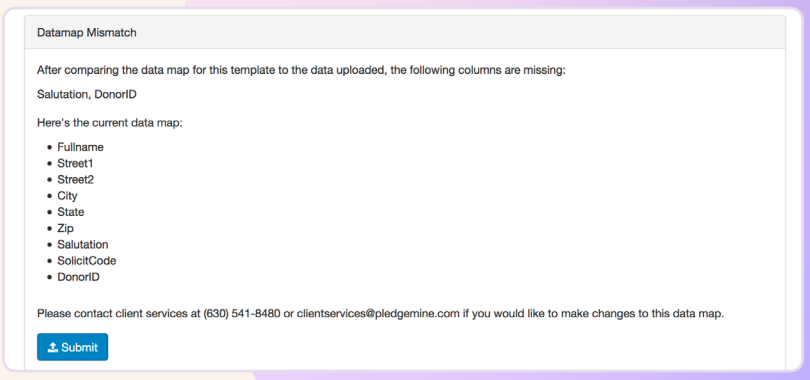
If your data file contains more than one sheet, you will be prompted to choose the correct sheet to upload.



Mismatched Columns

If the columns in your data file do not match the data map, an alert will show the columns that are missing in your data.

If your data is temporarily different from the map, you can change the column name(s) in your data and reupload. Alternatively, if you see this is as a consistent difference between the file and map, contact your Project Coordinator, and they can update it for you.

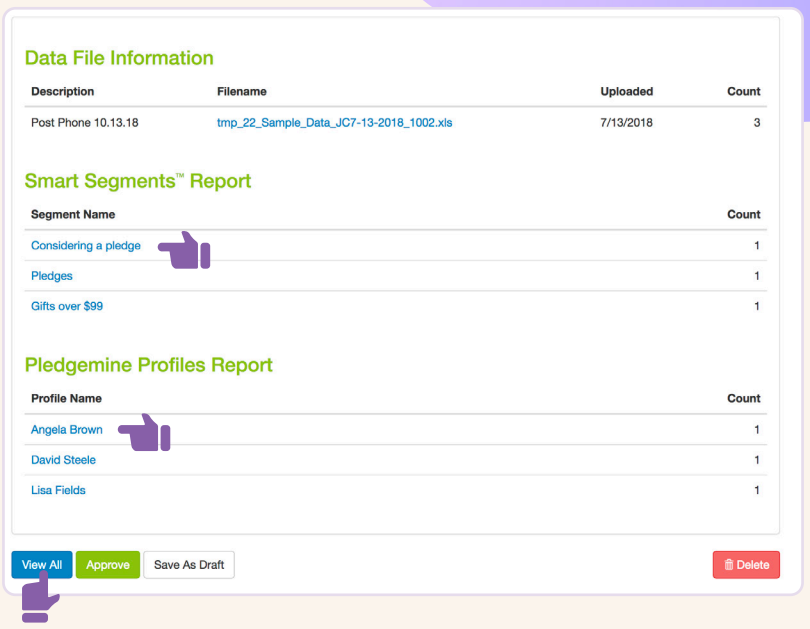


Your Segment Sifter Report

The Segment Sifter™ allows you to view information about your order, including the data source, segmentation applied, and profiles applied. To view all proofs in consecutive order, choose **"VIEW ALL"**.

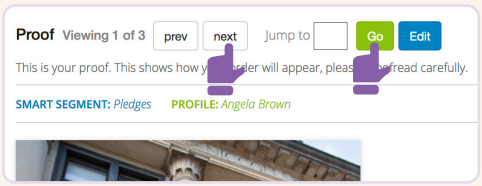
You can also view proofs by segment by clicking on the **segment name** or by **profile** by choosing the person you want to view.

If you would like to keep this order in composing to continue reviewing and/or editing at a later date, choose "Save As Draft". Choose "Delete" to completely remove the order from your account.

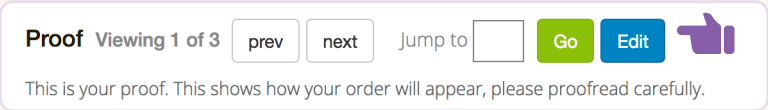


Viewing Proofs

When viewing proofs, choose the **"NEXT"** and **"PREV"** buttons to move through records. To go to a specific record, enter its place in the "Jump to" box and click **"GO"**.

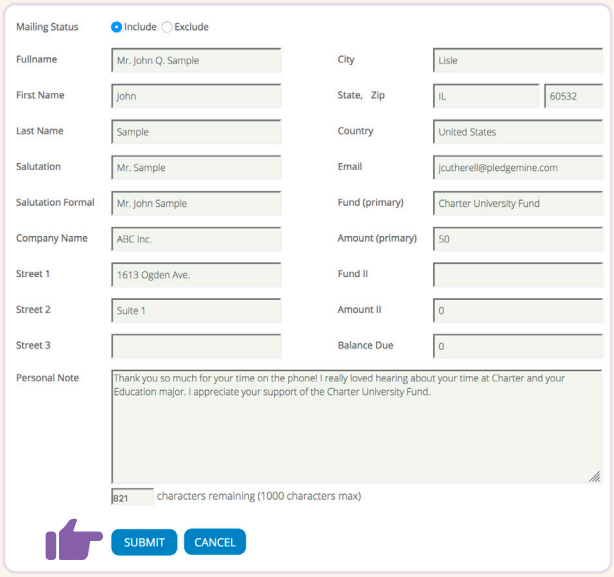


Editing Proofs



To edit information* on a record, choose the **"EDIT"** button, make your changes, and **"SUBMIT"**.

Not all information on a mail piece is available for editing.



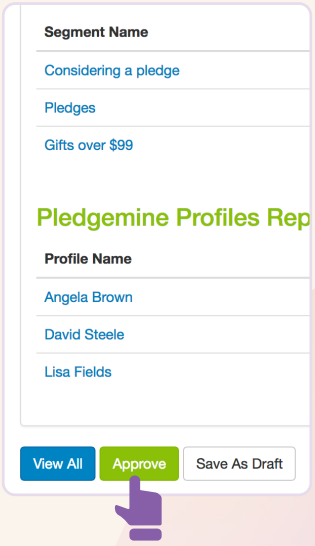
Approving Proofs

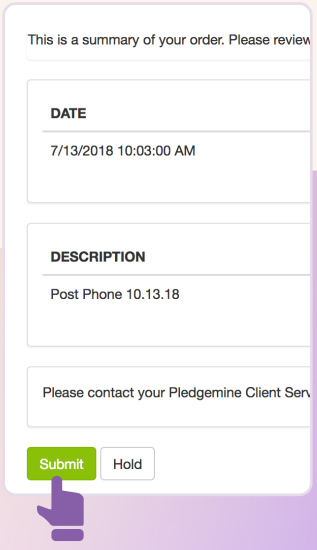
After all proofs have been sufficiently viewed/edited and ready to send to print, choose "DONE" to exit the proofs and return to the Segment Sifter™.

Choose **"APPROVE"** and **"SUBMIT"**

Please proof your jobs very carefully. Pledgemine will print all approved orders as is with the understanding that all records have been thoroughly reviewed.

If you see a problem with your order after approval, you may see a DELETE button when clicking on the order in Production. If this is the case, please feel free to delete the order. If the DELETE button does not appear, the order is already in production and you will see an option to attempt cancellation. Please note that cancellation is not guaranteed, but your Project Coordinator and the necessary teams will be notified and will follow up with the order status.





After Approval

Once your proofs have been approved, they will move into the **"In Production"** menu until they are completed and mailed.

After your order mails, you will see your Dashboard contract totals and postage balance update accordingly and the order will move to "Completed". If you've opted in for confirmation emails, you will receive that email as well.



