

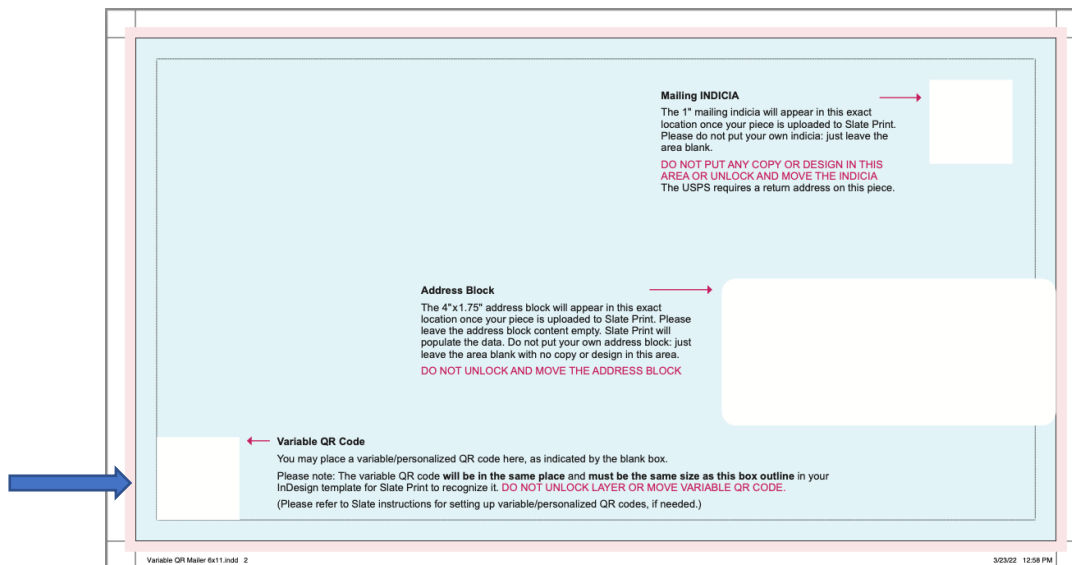


SETTING UP A VARIABLE QR CODE

With Slate Print, you can use a variable QR code to populate student or donor data on event, inquiry, and other forms—when you are using a Slate form. Populated forms have major advantages of being easier and faster to complete and help with data integrity. There is no extra cost for variable QR codes.

Preliminary Steps

- Variable QR codes are available on all digital Slate Print products. Variable QR codes **have a set placement**, so be sure download the product template for the product you wish to send before designing your print project. The product template will show you where the variable QR code will appear.
- Your InDesign art file should be designed with the variable QR code in the placement indicated on the product template.





Step 1: Set Up Your Print Project in Slate Print

Once you have created your InDesign file using the Slate Print template as a guide, you can set up your project in Slate Print and upload your zipped InDesign file.

Product Type: First, select the product type.

[Home](#) / [New](#) New Print Project

Choose from postcards, mailers, letters and cards with envelopes, custom projects and other print projects.
Please select the type of print project below.

Postcards & Mailers

Letters, Cards & Envelopes

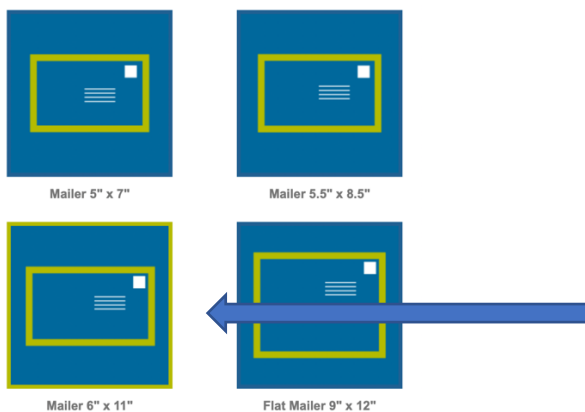
Other Products

Custom Projects

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Next

Product Selection: Then, select the actual product by double clicking on the item or clicking once and the clicking Next at the bottom of the page. The selected product icon will have a green border around it once selected.





Paper and Finish Options: You will then select your paper option, if available, and finish such as a UV coating, if available for your product. For some products there is only one paper option and no finish options.

Select Paper / Material

Product:Mailer 6" x 11"

Size (Flat/Folded)6" X 11" / 6" X 11"

Production Price By Minimum Quantity

1	200	500	1,000	2,500	5,000	10,000	15,000	20,000+
0.79	0.79	0.79	0.49	0.30	0.24	0.21	0.20	0.19

Please select the paper / material for your print project below.

Paper: 120# Dull Cover

120# Dull Cover (Sterling brand) is a premium, heavy paper option that is less likely to bend or fold during the mailing process. Your projects will have great color and image quality, and you can feel good using this paper for it eco features, which is Forest Stewardship Council (FSC) and Sustainable Forestry Initiative (SFI) certified. UV coating is available with this paper option, which could help protect your project from scuffs during the USPS mailing process.

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Sample Template File

Next

Variable QR Code Option: Next, choose **Yes** in the **Add Variable QR Code** dropdown to enable your template to have a variable QR code. If you want only a static QR code, you will choose **No**. You may have both variable and static QR codes on your piece. If that case, select Yes.

QR codes may be added to your print piece at no extra cost.

Static QR codes

 are limited to a single URL. They can lead to designated web pages, blank forms, etc. Static QR codes can be placed into your art file by your designer anywhere on the print piece, except for areas designated for the indicia and address block in the Slate Print template for this product.

Variable QR codes

 have personalized/variable URLs that are generated for each recipient. They can lead to Slate forms that can then be populated with recipient data. Note: Variable QR codes will appear in the white box indicated for the variable QR code on the SP template for this product. The designer will not need to add a QR code, just select yes for the variable QR code below and leave the white box area blank on your art file.

Add Variable QR Code: No

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Sample Template File

Next



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Production Method: If you select YES to add a variable QR code, the production method will default to Digital.

Please select the production options for your print project below.

Production Method: Digital

Full variable digital printing with no minimum quantity. Ideal for drip campaigns. We offer both digital and offset printing, so you can choose the production for your project. The number of records is calculated by the total number of records in a list per template per day.

Digital printing is fully variable and has no minimum record count requirements. **Offset** printing is a cost-effective solution for static projects, in which the mailing address is the only variability and when there are over 20,000 records per daily send.

Mailing (Postal) Option: Select your postage option.

Please select the mailing options for your print project below.

Mailing Option: Nonprofit

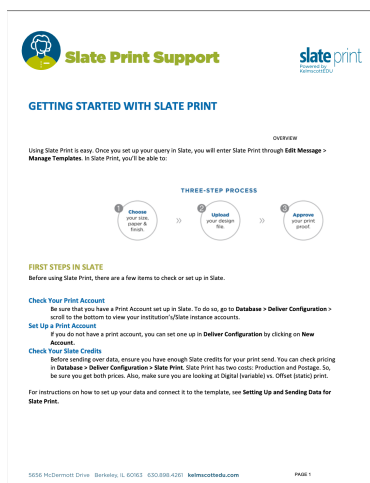
Cost effective mailing for nonprofit organizations with a 200 recipient minimum for reduced postage rates.

Nonprofit mailings have a minimum requirement of 200 records and require a Nonprofit Authorization Number in your Slate Print account.

Standard Presort mailings have a minimum requirement of 200 records but do not require a Nonprofit Authorization Number.

First-Class Presort mailings have a minimum requirement of 500 records.

For more information about setting up a Slate Print mailing, see the support document and/or view the video **Getting Started with Slate Print** in the **Support area** of Slate Print.





Slate Print Support

Upload Your File: Now you are ready to upload your zipped InDesign template.

Select & Upload Your Zip File

Upload your zip file here.

Choose File no file selected

Legal Disclaimer
nt platform ("Files"), Customer represents and warrants that it has secured all ne
w embedding and/or editable embedding, as necessary for Printer to perform Cus
d hold harmless Printer against all losses arising out of any claim by an unaffiliate
with Customer's requested services, infringes an intellectual property right of any th

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Next

After you have successfully uploaded your InDesign file, you can view a digital proof with sample data. You can fill in your own information as sample data for the variable fields in your piece, including the QR code.

View Proof with Sample Data

A sample URL will be prepopulated in the QR code field as a placeholder. You can leave it there, or manually enter a URL. Just know that the URL will be static in Slate Print as the Slate Print proof only shows sample data and is not merged with variable fields in Slate yet.

Mailing Address

FIRSTNAME

Kathleen

LASTNAME

Cross

ADDRESSLINE1

123 South Street

ADDRESSLINE2

CITY

Milwaukee

STATE

WI

ZIPCODE

53012

Additional Variables

PREFERRED

Kathleen

QRCODE

https://mittera.com/hic

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Next



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Please Note: **At this stage, the QR code will NOT yet be variable.** This will happen in Slate once you merge variable field with your query data, which you will do in Slate.

How the QR code may look

If the QR code sample field is left blank, it will be blank in the proof.



If the sample QR code is populated with a sample URL, it will show a QR code, but it will not be variable yet.



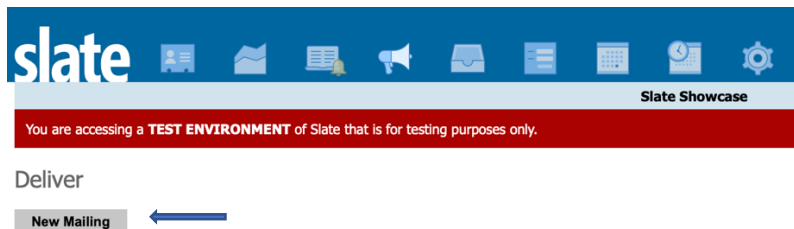
In this step you will view the digital proof with sample data by clicking on **View Document Proof**. When you are ready to approve your proof, click on **Approve Document** and name your template and folder where you want it saved.

View Document Proof

Approve Document

Part 2: Set Up Your Slate Print Mailing in Slate

You will set up your Slate Print mailing in Slate just as you would with any other Slate Print mailing by going to Deliver > Mailings > New Mailing.



Name your new project. You may wish to add “Variable QR” to the mailing name to distinguish it from your other mailings. Select **Slate Print** from the method dropdown, and click **Save**.



New Mailing

Name: Variable QR Mailing

Folder: [dropdown]

User: Admin, Demo

Realm: [dropdown]

Method: **Slate Print**

Hide from Timeline: ☐

Save **Cancel**

Slate Print In Progress

Set Up Your Query

Go to Edit Recipient Lists on the right side of the screen, and then create a new query for your mailing or import an existing one.

Edit ▼

Edit Recipient Lists **Edit Message** **Send Mailing**

Recipient Lists

New Query **Import Query**

Name

Slate by Technolutions (Slate Showcase)

There may be additional instructions and methods in Slate to set up a variable URL. The following is a common, straightforward method. Please see Slate support documentation for additional methods.



Select Prospect ID

The query set up will be the same for variable QR mailings as any other print query set up, with one exception. Be sure to select **Prospect ID** as a field in the query set up. Prospect ID be later added to the URL to create a personalized/variable URL.

Insert Query Part [X]

Search:

Groups: ☒ Pinned Exports ☒ Local Exports ☒ Slate Template Library

Local Exports

Record Details

Select All Prospect ID ←

Slate Template Library

Active Address (Geographic Proximity by Lat/Long)

Distance:

Active Address (Geographic Proximity)

Distance:

Mailing Address (Geographic Proximity)

Distance:

Mailing/Permanent Address (Geographic Proximity)

Distance:

Other

Select All Program of Study

Permanent Address (Geographic Proximity)

Continue Cancel

Reminder: With Slate Print, **you must also select Country** and then limit the query to the **United States** as Slate Print only mails within the U.S. and U.S. territories.

Once you have completed your query, your exports will look similar to this (depending on your other variable fields).



Exports

Preferred
First
Last
Major
Active City
Active Street 1
Active Street 2
Active Region
Active Country
Active Postal
Prospect ID



Step 3: Merge Your Query Data with Your Print Template

Now you are ready to merge the data in your query with the variable fields in your print template. To do so, click on **Edit Message**.

Edit Recipient Lists

Edit Message

Send Mailing



Select your InDesign template for this project, by clicking on the Template dropdown. You will now see the variable fields in your piece, including your variable QR code field, on the screen.

Template

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Manage Templates

PREFERRED

QR CODE

Sender

Account

Recipient

Name

Street #1

Street #2

City

Region

Postal

Country

Save

Cancel

Active-City

Active-Country

Active-Postal

Active-Region

Active-Street-1

Active-Street-2

First

Last

Major

Preferred





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Merge Data to Variable Fields

You will now merge the data fields on the right with the variable fields in your piece by pulling over the data fields to the corresponding variable fields. The names of the data fields and the variable fields **do not** need to match exactly. The merging process will marry the data to the variable field.

For the variable QR code, you will:

- Enter/type the URL.
- Then, add “?person=”.

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[Manage Templates](#)

{{Preferred}}

go.chapman.edu/portal/campustours?person=|

Acti
Acti
Acti
Acti
Acti
Acti
Firs
Last
Maj
Pref
Pros

Then, pull over the **Prospect ID** data field from your list of data fields.

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[Manage Templates](#)

{{Preferred}}

go.chapman.edu/portal/campustours?person={{Prospect-ID}}

Active-City
Active-Country
Active-Postal
Active-Region
Active-Street-1
Active-Street-2
First
Last
Major
Preferred
Prospect-ID



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Now, you can merge the fields in the address block.

- Be sure to have a space between merge fields such as {{First}} {{Last}}.
- You can add hard coded copy such as **To the Parent of** in type in front of {{First}}, if desired.
- Be sure to select the print account in Account.

Remember: for Slate Print, you must have selected the United States (and U.S. territories) only in your query.

When you have completed merging your fields, click **Save**.

The screenshot shows the 'Edit Envelope' window. The 'Template' dropdown is set to 'Mittera EDU'. The 'REFERENCE' field contains '{{Preferred}}'. The 'QR CODE' field contains 'go.chapman.edu/portals/campusours?person={{Prospect-ID}}'. The 'Sender' section has 'Account' set to 'Print Account'. The 'Recipient' section has the following fields: Name ({{First}} {{Last}}), Street #1 ({{Active-Street-1}}), Street #2 ({{Active-Street-2}}), City ({{Active-City}}), Region ({{Active-Region}}), Postal ({{Active-Postal}}), and Country ({{Active-Country}}). A 'Save' button is at the bottom left.

The subsequent steps are the same as with any Slate Print mailing.

Step 4: Proof Your Print Piece

Now you can proof your print piece with live data. To do so, simply click on **Display Sample Message** on the right side of the screen.

You can either enter a specific record by typing in the name and searching for it or clicking the Display button to toggle to the next record. Then, click **Display**.



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You will see a live proof with variable data, including your variable QR code. **Double click to see the back of the piece.** It is important to check to be sure all your variable fields are populating correctly and that your mailing panel is correct.

Continue to check live proofs to your satisfaction. You can choose the next proof or enter a name for a specific proof.

Be sure to proof the mailing panel!

Note: “Place Stamp Here” is simply a placeholder for the nonprofit or first-class indicia, a stamp in cases of single-piece, etc. Slate Print will update the indicia in the data processing process for mailing.

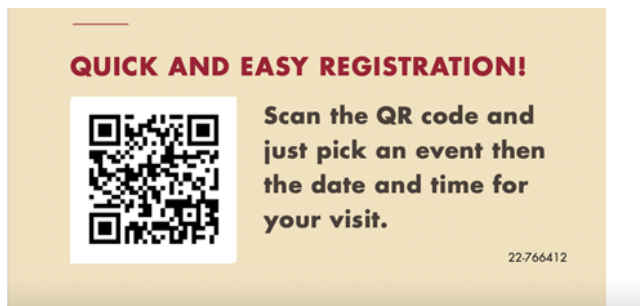


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You can also **test the URL** for your variable QR code by using your smart phone. Simply hold the phone camera to the QR code on your print piece digital proof.



If your variable QR code is going directly to a Slate form, you will see it populate:

Student Information

First Name*
Kathleen

Last Name*
Cross

Birthdate*
[Month] [Day] [Year]

Contact Information

Email Address*
kathleen.cross@mittera.com

Mobile Number
[Number]

Would you like to receive information via text/SMS? (SI)
☐ Yes
☐ No

Mailing Address

Country
United States

Street
123 South Street

City
Milwaukee

State
Wisconsin

Postal Code
53012



Step 5: Sending a Proof (Optional)

If you wish to send yourself a physical proof(s), you can do so in Slate.

Recommended: We recommend you send a proof by setting up a query (or Excel spreadsheet) with the addresses for the proofs. Be sure to add any variable field data as well so that your variable fields and content blocks populate in your proof.

Also, you can send a support ticket or email us directly if you would like us to send your proof to you via UPS for faster delivery. There is no extra cost for this service for proofs, but you need to request this service.

Not Recommended: We recommend you do **not** use Send Test for sending proofs if you have any variable data, including the variable QR code. This is because the Send Test option will only allow for the address to be entered.

DO NOT USE

Send Test

Method

- ☐ Generate PDF preview test.
- ☒ Send test by postal mail.

Name

Country: United States

Street Address

City

State: Select State

Postal Code

Send Test Cancel

Step 6: Send the Mailing Data - Two Step Process

When you are ready to send the data, click on **Send Mailing**.



IMPORTANT: There are **two steps** to sending data for print.

1. First, you will **send** the data.
2. Then, you will **go to the Slate Outbox to confirm** that you want to send it by **approving it**.



Step 1: Send the Data

Slate will show any pre-flight warnings before you send the data. Be sure to look for this and fix any issues before sending.



If there are no pre-flight issues identified, you will receive a message of no errors identified. This will not identify issues with variable fields, so be sure to do the proofing process above.

- You will also see a summary cost for your project.
- Complete any other pertinent fields for your project.
- When you are ready, click on **Send Mailing**.

A pop-up window will appear for you to confirm you want to send the mailing (to the Slate Outbox). To confirm, type **SEND** into the blank text field. **Click OK.**



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The status will show Scheduled/Running.

All Mailings

Variable QR MitteraEDU

Method	Slate Print
Folder	
User	Demo Admin
Recipient Lists	Variable QR MitteraEDU (live query) Active Address (State) IN Minnesota
Current Status	Scheduled/Running
Start Date/Time	08/31/2022 02:35 PM
Stop Date/Time	

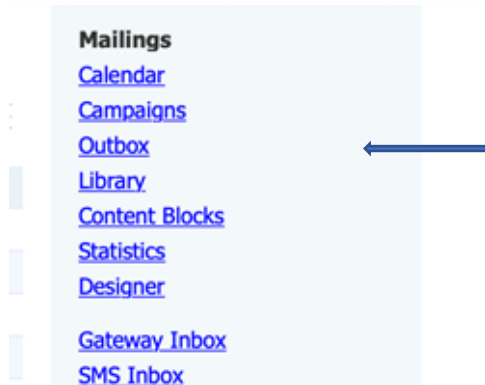
Step 2: Approve from Slate Outbox

Now you need to go back to Deliver and click on **Outbox** on the right side of the screen.



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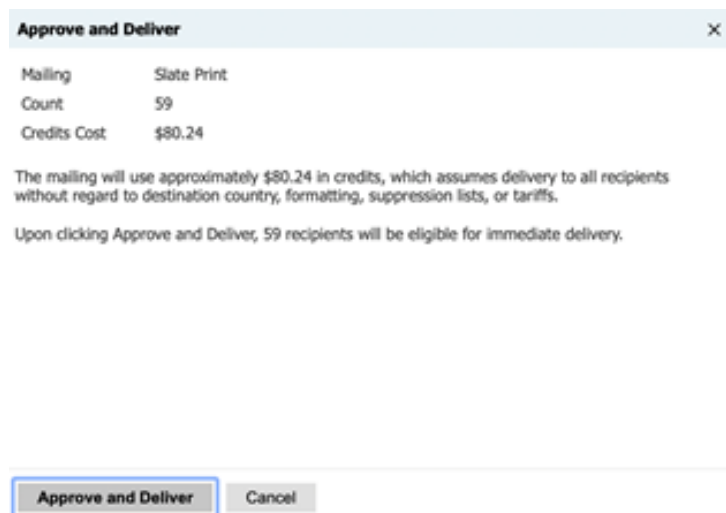
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Your mailing will take some time to process and appear in the Outbox. Once it is ready, you can select it, and click on Approve and Deliver.



A pop-up window will appear and ask you to confirm you wish to approve and deliver the data by typing APPROVE AND DELIVER and by clicking Approve and Deliver.



You have now sent your data. You can check to be sure it was sent by looking on the student or donor timeline to see Data Sent, and you can also check for the Slate credits being debited from your Print Account.