SETTING UP LETTERS, CARDS & ENVELOPES

Slate Print allows you to set up letters and cards with envelopes as one-time sends or as an ongoing drip mailing within your communication flows in Slate. This guide provides step-by-step instructions for setting up your letters, cards and envelopes in Slate Print and attaching and sending data from Slate.

Step 1: Select your Letter or Card and Envelope Project

In Slate Print, you can select from a wide variety of letters, cards, envelopes, mailing labels, etc. for your recruitment or donor project. If there is size you wish to send that is not in Slate Print, you can reach out to us, and we can either add the option or create a custom project for you.

In Slate Print, click on **New** in the top navigation bar, and then click **Letters, Cards & Envelopes.**


You will see instructions to select your envelope first and then your letter or card. This is because the envelope must be set up first and then the letter/card will be attached to the envelope.

Select Project Sub Category

1. First, select the envelope for your print project.
   2. Then, select the card or letter type.

Select Your Envelope

There are many envelopes to choose from, including #10 regular or window, 9x12 regular or window/catalog or booklet, A6 and A7. Be sure the envelope you select matches your letter or card size and other specifications (Ex. window envelopes must go with window letters, etc.).
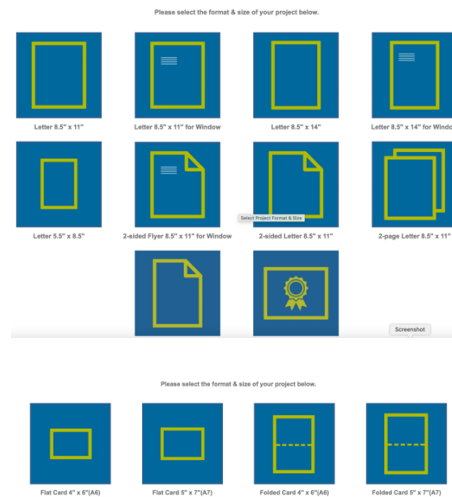

Please select the format & size of your project below.
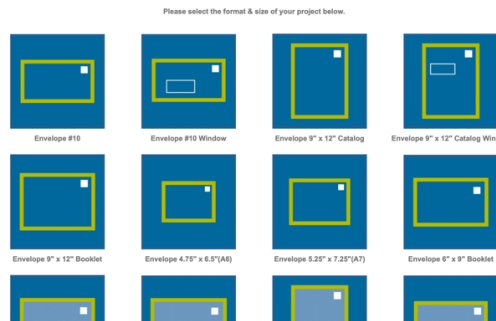
IMPRINT envelopes are for MitteraEDU use. We use these when setting up custom projects with pre-printed envelopes.

Select Your Letter or Card

Then, select your letter or card for your project.

Step 2: Download the Slate Print Templates!

Be sure to download the corresponding templates for the letters, cards and envelopes you wish to send before designing your print project for instructions on preparing your InDesign templates.

Double click on the product and then download the template by clicking on **Sample Template File**.
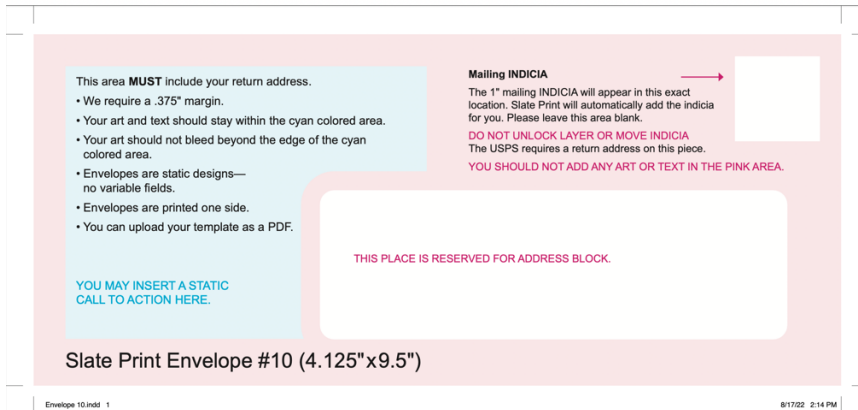

Envelopes have a set placement for the **indicia** and **address block**, and the template will show you where they will be added upon upload by Slate Print. Your InDesign art file should be designed leaving those areas free of copy and design as these areas will be used by Slate Print for your mailing.
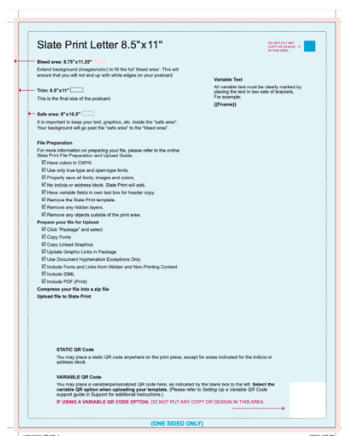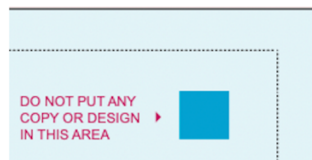
Slate Print Support

Letters and Cards (regular, non-window) will have a **2D barcode** placed on them by Slate Print. The 2D barcodes have a set placement in the upper right corner, the template will show you where it will be added upon upload. Your InDesign art file should be designed leaving that areas free of copy and design as it will be used by Slate Print for your mailing.

2D Barcodes are used for matching (regular, non-window) letters, envelopes, and other components of your multiple piece mailings. They are better than simple number or manual matching as they are a more precise matching system for letters and envelopes for matching of personalized documents and inserts into personalized envelopes.

Variable QR code: You can add variable or static QR codes to your letters and cards, if desired. There is a set placement for a variable QR code, and this is shown on the product template. For more information about how to set up a variable QR code, see our guide, **Setting Up a Variable QR Code**, in the Support area of Slate Print.

Step 3: 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 files. 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.
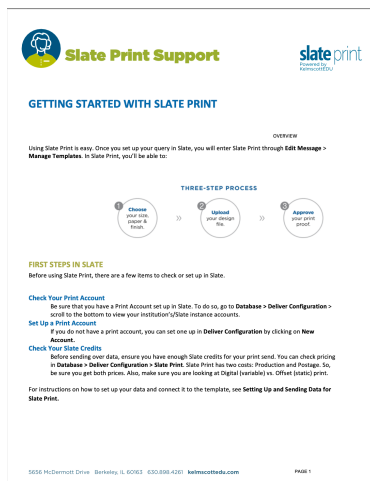
Uploading Letters and Envelopes

IMPORTANT - For letters/cards and envelopes, you need to:

1. **Upload your envelope/mailing label first.**
2. **Then, upload your letter or card.**

If you try to upload your letter or card first, it will ask you for your envelope.

When you **upload your letter**, you will

1. First, **select the envelope type** for the mailing from the dropdown
2. Second, **select the name of your envelope** file you have uploaded.

Step 1: Upload Your Envelope. Go to the New tab in Slate Print, and double click on the Letters, Cards & Envelopes tab. Then, double click on Envelopes.

Double click on the envelope product you wish to send.
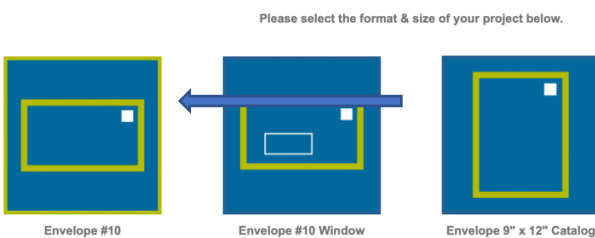
Upload your envelope art file into Slate Print.

Then, approved and save the envelope. Then, go back to **New** and select the letter or card product you are planning to send.

Step 2: Upload Your Letter or Card. Now you are ready to upload your letter or card file. From the **Letters, Cards & Envelopes** area, select **Letters** or **Cards.** Then, select the product you wish to send by double clicking on the product icon or clicking once and then clicking **Next** at the bottom of the page.

Variable QR Code Option: 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 ▲▼

[Back] [Sample Template File] [Next]

Connect your Envelope to your Letter or Card. Now, you will connect you envelope to your letter or card by selecting the envelope type and then your previously uploaded envelope.

Please select the envelope options for you print project below.

Envelope Type: #10 Standard Envelope ▲▼

#10 Standard Envelope Description

Please select one of your existing envelope templates.

It is required to create an envelope before creating a letter.

Envelope Template: Kathleen Test #10 Envelope 2 ▲▼

[Back] [Sample Template File] [Next]

This process will **connect your envelope with your letter.**

Production Method: If you select YES to add a variable QR code, the production method will default to Digital. You may or may not see this screen.

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.

View Proof with Sample Data

After you have successfully uploaded your letter zipped InDesign file, you can view a digital proof of the letter with sample data. You can fill in your own information as sample data for the variable fields in your piece. The envelope will not be visible, but it will be connected to the letter.

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/hig |

Back   Next

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

Step 4: 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**.

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.

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).

Step 5: 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**.

IMPORTANT: Select your **letter InDesign template** for this project, by clicking on the Template dropdown. You will be able to see your envelope in the dropdown, but you will not select it. **Select only the letter.** You will attach all the data for this mailing, including the address, to the letter. The envelope is in the background.

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.

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

Step 6: 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**.

You will see a live proof with variable data. **Double click to see the back of the piece** if your letter or card has more than one side. 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.

Step 7: 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

Step 8: 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.**

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.

Mailings
Calendar
Campaigns
Outbox
Library
Content Blocks
Statistics
Designer

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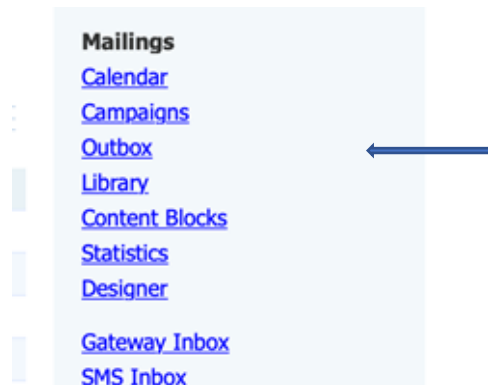
Your mailing will take some time to process and appear in the Outbox. Once it is ready, you can select it, and click on Approve and Deliver.

Approve and Deliver

Abort Delivery

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.

Approve and Deliver ✕

Mailing	Slate Print
Count	59
Credits Cost	$80.24

The mailing will use approximately $80.24 in credits, which assumes delivery to all recipients without regard to destination country, formatting, suppression lists, or tariffs.

Upon clicking Approve and Deliver, 59 recipients will be eligible for immediate delivery.

Approve and Deliver   Cancel

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.