

Direct Mail Checklist



Job Overview

Please provide a brief description of your direct mail project and any special requirements or notes.



Job Information

Desired Mail Date

Postage Classification

File Name and Location

Data Classification

Secure

Non-Secure

Mailing Reports Required

(If yes, please specify pre and post mailing requirements)

Yes

No

More Info:

Mailing From

(Post Office location)

Merge/Purge

(If merge, please specify requirements)

Merge

Unmerge

More Info:

Non-Deliverable Instructions

Dedup File Type

NCOA

Yes

No

Keep New Movers

Yes

No



Job Information (Continued)

Keep Recipients with No Forwarding Address	Yes	No
CASS Reports	Supplied	Outstanding
Lot Qty and Instructions		
Additional Variable Data	Yes	No
Presort Class		
Drop Ship	Yes	No
Commingle	Yes	No
Carrier Route (CRRT)	Yes	No
Postage		
Permit Number		
Customer Registration ID		
Nonprofit Authorization Number (If applicable)		
Post Office City/State (Where permit is held)		
Permit Owner Name & Address		
Two-Dimensional Barcode	Yes If Yes: Match	No Non-Match
Tracking Required	Yes	No
Preferred Tracking Vendor		



Job Information (Continued)

Seed File

Embedded in Mail File

Supplied Separately

Seed Special
Handling Required

Samples

Yes

No

Sample Qty and Instructions

Weight

Thickness

Additional Notes

Personalization and Imaging

Stock

Form Size

Final Size

Personalization

Inkjet

Digital

Simplex or Duplex

Simplex

Duplex

Variable Data

Black Only

Full Color

Data Sign-Off Requirements



Lettershop

OE Size

Reply Envelope Supplied	Yes	No
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Window or Closed Envelope Window Envelope Closed Envelope

Insert Qty (Please include specifications if applicable)

Insert Sequence
(From front to back of envelope)

Fold Type (If applicable)

Insertion Sample Required Yes No

Match Mail	Yes	No
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Excess Materials
(Keep for future jobs or recycle) Keep Recycle

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