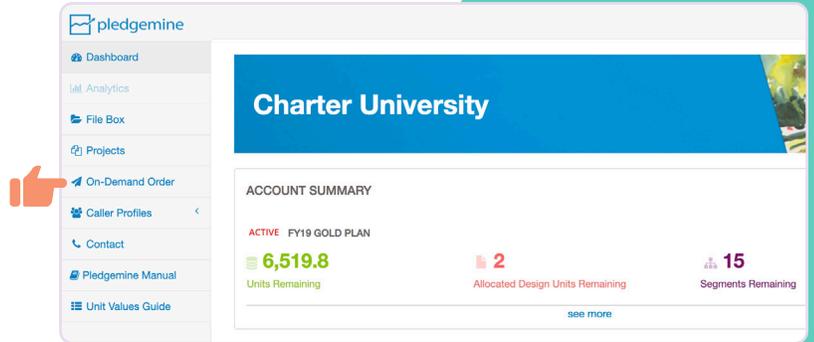# Pledgemine
by evertrue

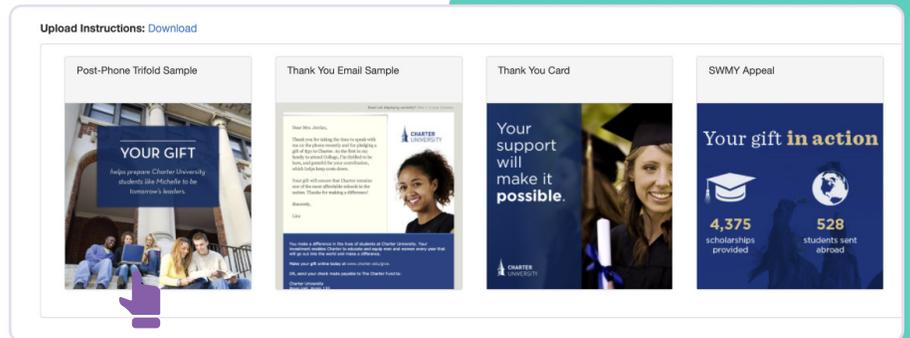# Uploading a New Data File

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.
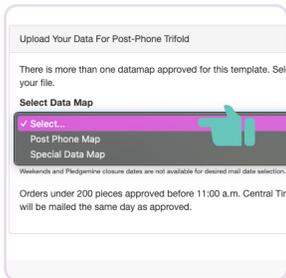

Select Your Project

Click on the appropriate on-demand project.
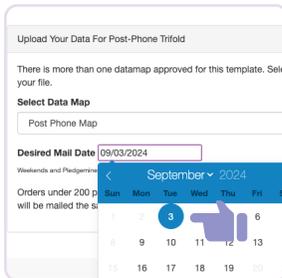

Upload Your Data
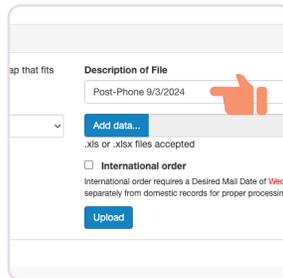
1 MAP
Choose your data map (if applicable)

2 MAIL DATE
Choose your mail date (*optional)

3 DESCRIPTION
Add a file description

4 DATA FILE
Choose your data file
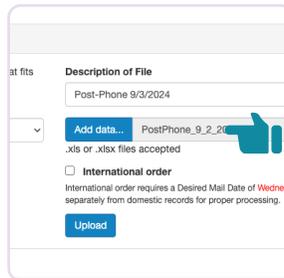
5 UPLOAD
Click Upload
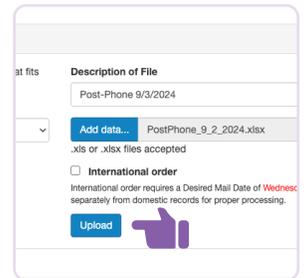
*This is the date you would like the order to leave our facility. If you would like your order released as soon as possible, leave the default date, which is our next business day. Please note, not all requested mail dates may be possible due to order size.

International Records

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.

Multiple Sheets

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

Select Sheet

Your file contains more than one sheet. Please select the sheet that contains the data you want to use.

Select Sheet

✓ Select...
Post-Phone Pieces
Summary

⬆ Submit

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 Customer Operations Partner, and they can update it for you.

Datamap Mismatch

After comparing the data map for this template to the data uploaded, the following columns are missing:

Salutation, DonorID

Here's the current data map:

- Fullname
- Street1
- Street2
- City
- State
- Zip
- Salutation
- SolicitCode
- DonorID

Please contact client services at (630) 541-8480 or clientservices@pledgemine.com if you would like to make changes to this data map.

⬆ Submit
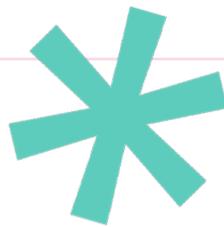
Your Segment Sifter Report

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.

Data File Information

Description	Filename	Uploaded	Count
Post Phone 10.13.18	tmp_22_Sample_Data_JC7-13-2018_1002.xls	7/13/2018	3

Smart Segments™ Report

Segment Name	Count
Considering a pledge	1
Pledges	1
Gifts over $99	1

Pledgemine Profiles Report

Profile Name	Count
Angela Brown	1
David Steele	1
Lisa Fields	1

View All | Approve | Save As Draft | 🗑 Delete

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"**.

Proof Viewing 1 of 3 | prev | next | Jump to | Go | Edit

This is your proof. This shows how your order will appear, please proofread carefully.

SMART SEGMENT: *Pledges*   **PROFILE:** *Angela Brown*

YOUR HELP

Editing Proofs

Proof Viewing **1** of **3** [prev] [next] Jump to [____] [Go] [Edit]

This is your proof. This shows how your order will appear, please proofread carefully.

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

not all piece information is available for editing.

Mailing Status	● Include ○ Exclude		
Fullname	Mr. John Q. Sample	City	Lisle
First Name	John	State, Zip	IL · 60532
Last Name	Sample	Country	United States
Salutation	Mr. Sample	Email	jcutherell@pledgemine.com
Salutation Formal	Mr. John Sample	Fund (primary)	Charter University Fund
Company Name	ABC Inc.	Amount (primary)	50
Street 1	1613 Ogden Ave.	Fund II	
Street 2	Suite 1	Amount II	0
Street 3		Balance Due	0

Personal Note: Thank you so much for your time on the phone I really loved hearing about your time at Charter and your Education major. I appreciate your support of the Charter University Fund.

821 characters remaining (1000 characters max)

[SUBMIT] [CANCEL]

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, your order is already in print. Please contact your Customer Operations Partner immediately if this is the case.

Segment Name

Considering a pledge

Pledges

Gifts over $99

Pledgemine Profiles Rep

Profile Name

Angela Brown

David Steele

Lisa Fields

[View All] [Approve] [Save As Draft]

This is a summary of your order. Please review

DATE
7/13/2018 10:03:00 AM

DESCRIPTION
Post Phone 10.13.18

Please contact your Pledgemine Client Serv

[Submit] [Hold]

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.

MAILINGS			Composing · In Production · Completed
Date	**Template**	**Name**	**Count**
7/13/2018	Post-Phone Trifold Sample	Post Phone 10.13.18	3

POSTAGE BALANCE Last Deposit: 7/12/2018, $3,250.00

✉ **$981.08**   see usage

see postage prices