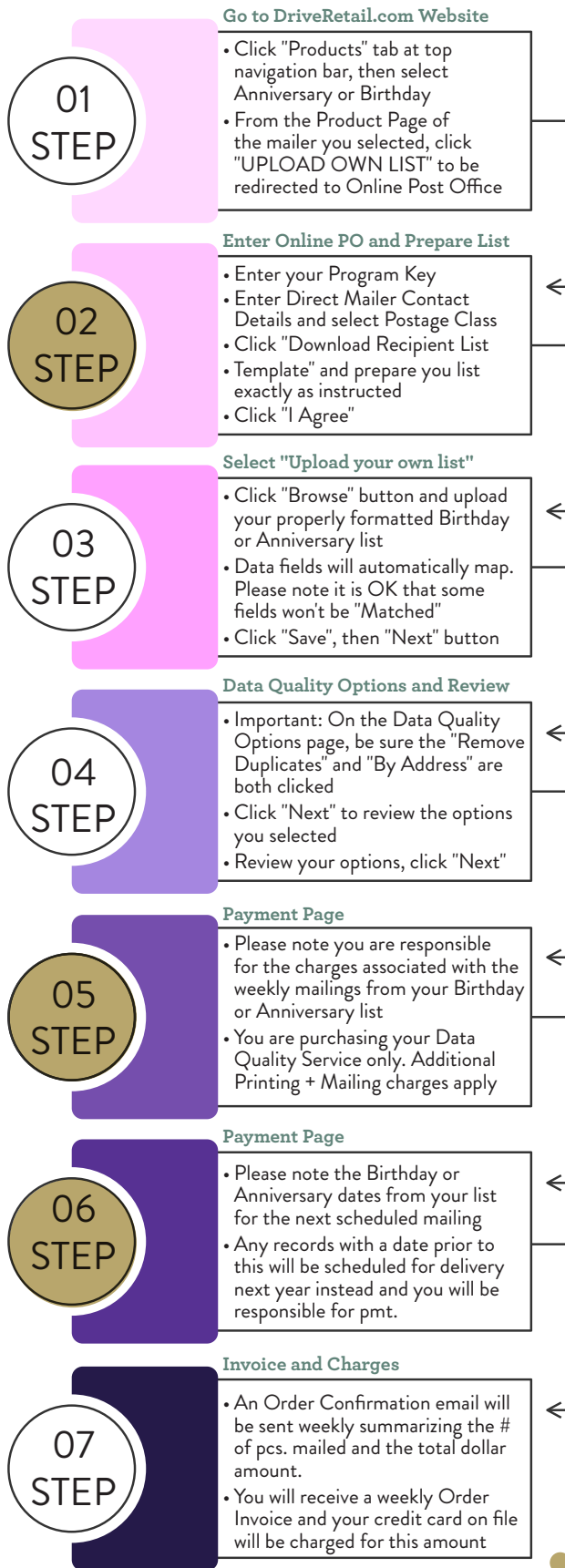# how our "auto send" program works:

NON-EDGE SOFTWARE USER
Directions to Automatically Send Birthday or Anniversary Orders

EDGE SOFTWARE USER
Directions to Automatically Send Birthday or Anniversary Orders

TO "AUTO SEND" BIRTHDAY AND ANNIVERSARY MAILERS FROM THE EDGE SOFTWARE, PLEASE CALL 770-937-0735

01 STEP

Go to DriveRetail.com Website
- Click "Products" tab at top navigation bar, then select Anniversary or Birthday
- From the Product Page of the mailer you selected, click "UPLOAD OWN LIST" to be redirected to Online Post Office

02 STEP

Enter Online PO and Prepare List
- Enter your Program Key
- Enter Direct Mailer Contact Details and select Postage Class
- Click "Download Recipient List
- Template" and prepare you list exactly as instructed
- Click "I Agree"

03 STEP

Select "Upload your own list"
- Click "Browse" button and upload your properly formatted Birthday or Anniversary list
- Data fields will automatically map. Please note it is OK that some fields won't be "Matched"
- Click "Save", then "Next" button

04 STEP

Data Quality Options and Review
- Important: On the Data Quality Options page, be sure the "Remove Duplicates" and "By Address" are both clicked
- Click "Next" to review the options you selected
- Review your options, click "Next"

05 STEP

Payment Page
- Please note you are responsible for the charges associated with the weekly mailings from your Birthday or Anniversary list
- You are purchasing your Data Quality Service only. Additional Printing + Mailing charges apply

06 STEP

Payment Page
- Please note the Birthday or Anniversary dates from your list for the next scheduled mailing
- Any records with a date prior to this will be scheduled for delivery next year instead and you will be responsible for pmt.

07 STEP

Invoice and Charges
- An Order Confirmation email will be sent weekly summarizing the # of pcs. mailed and the total dollar amount.
- You will receive a weekly Order Invoice and your credit card on file will be charged for this amount

● Denotes Important Step