A Quick Guide to the Stannp Online Platform

Getting Started

If you have not already done so, signing up with Stannp's online platform is super quick and easy. You will only need a name and email address to sign up and most of the other form fields are optional. Additionally, you will never be asked for credit card details until you decide to post your first campaign, so if you do not want to use Stannp at this time then it will not matter.

How it works

Conceptually, all the Stannp online platform does is take a list of addresses from a spreadsheet and place them onto a printed page that can be sent by post. For example, below is my spreadsheet with a list of fake addresses:

|	A	B	C	D	E	F	G	H	I	J
1	Title	First Name	Surname	Address1	Address2	City	State	Zipcode		
2	Mr	Truman	Malone	4889 Whitetail Lane		Dallas	TX	75207		
3	Mrs	Vanesa	Chambers	886 Cerullo Road		Louisville	KY	40203		
4	Miss	Luna	Gage	3680 Elm Drive		Garden City	NY	11530		
5	Mrs	Kayla	Barnett	4062 Kembery Drive		Hickory Hills	IL	60457		
6	Mr	Dwight	Falconer	3163 Austin Secret Lane		West Valley City	UT	84119		
7										
8										
9										
10										
11										
12										

And this is how that list might appear on a set of basic printed letters:
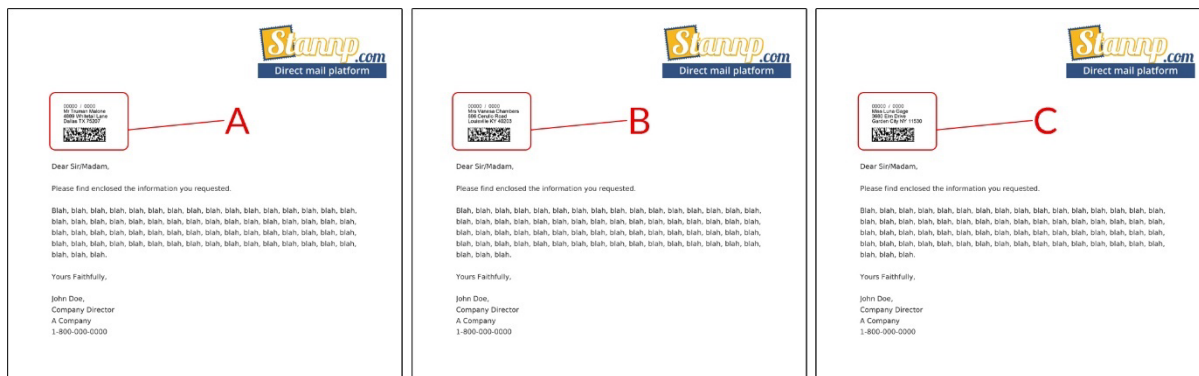
Notice that all the letters look the same except the addresses (**A, B, C**) which are substituted with the ones we put in the spreadsheet. This is commonly referred to as **Mail Merging** or **Direct Mail**. And, although the Stannp platform does infinitely more, understanding how this works is the key to understanding how to use the website.

Campaigns & Mailings Lists

When you first log into your Stannp account you will be presented with the following page:
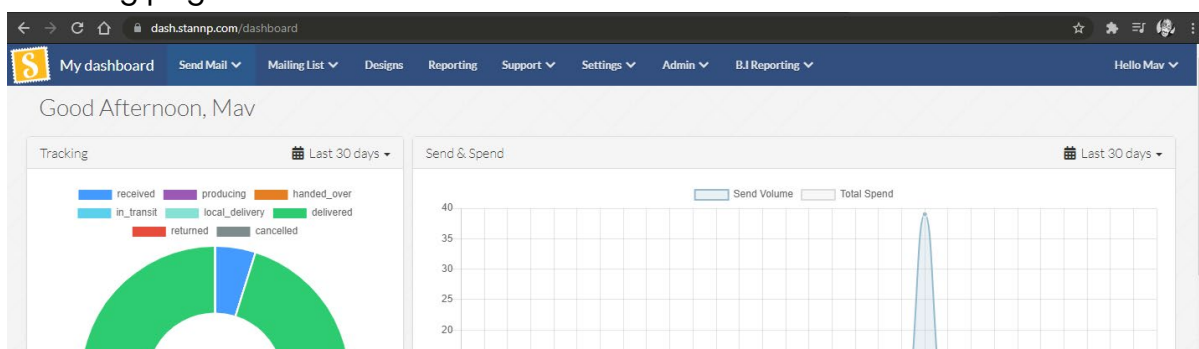
For now, the only things you really need to be concerned about is the first two buttons after My Dashboard at the top: **Send Mail** and **Mailing list**.
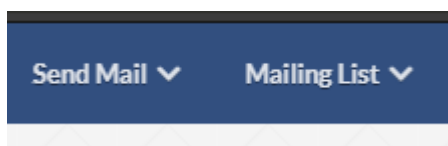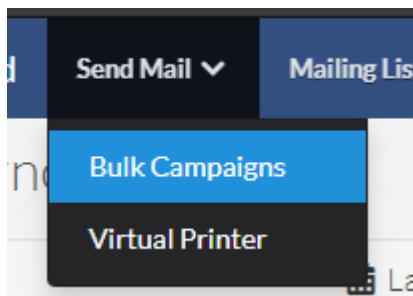

Campaigns

To get to your campaigns, click on **Send Mail** and choose **Bulk Campaigns** from the dropdown.

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At first it looks a bit intimidating, but each campaign setup is separate from all others so **nothing you do can mess anything up**. If you do not like how your campaign is going, or if you think you chose the wrong options, you can simply delete the campaign completely and start over! This guide will show you how to do that shortly.

Just imagine your campaign as your letter or postcard design. It shows the physical thing that will be printed and posted. You can create a Campaign completely separately from any address list and you can attach or remove any address list to your campaign.

Clicking on the '**Create a New Campaign**' button will take you to the campaign wizard so you can design your document.

Sizes:

For US customers we have four sizes currently available, **4"x6" Postcard**, **6"x9" Postcard**, **8.5"x11" Letter**, and **6"x11" Postcard**. Whichever size you choose the following steps will still apply.

Additional information and current pricing are shown below each format (though prices and features are all subject to change).

Campaign Options

Once you have chosen one of the above formats, you will be asked to name and choose a Postage class for your campaign:

Templates

Once you have clicked **Create Campaign**, you will be asked to also choose a template. The below is what appears when you select **8.5x11 Letter**.

Templates exist to help you get started but you can also create and save your own templates. Which template you choose does not really matter since they can all be edited in exactly the same way. Templates exist merely to save you time, so for now, let us just click on the **A Blank Canvas** template.

The Campaign Wizard

You can customize your design with the **Design Mail Piece** editor. This allows you to add text, a background, and any other pictures or logos that you would like to insert into your design.

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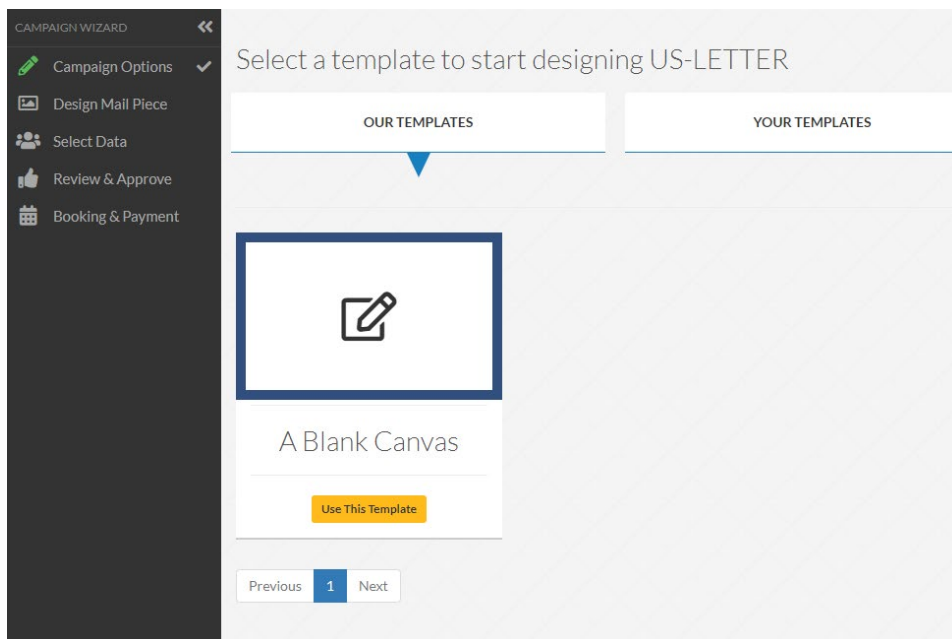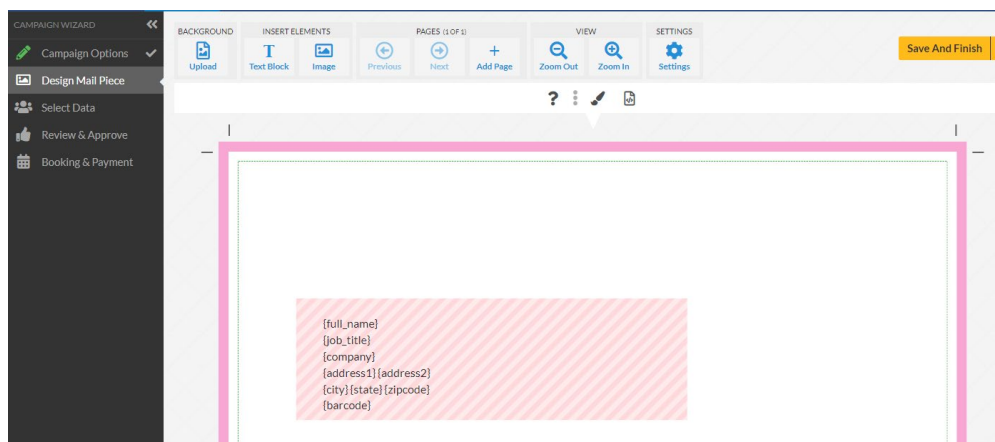Notice the black menu bar on the left called the **Campaign Wizard**. This bar allows you to move quickly back and forth between the different stages of creating your mailing.

The order in which you do things does not matter so you can click up and down the list in any way you see fit. The only thing to remember is to make sure that you press the **Save And Finish** button if you do not wish to lose the design you have been working on!

In actuality, the **"…And Finish"** part of the **Save And Finish** button is not final, it just saves your work. So, if you are **not** finished you can still go back and edit it again. In fact, we recommend you click **Save And Finish** every 5-10 minutes if you are working on a detailed design. That way you will always have your latest updates saved.
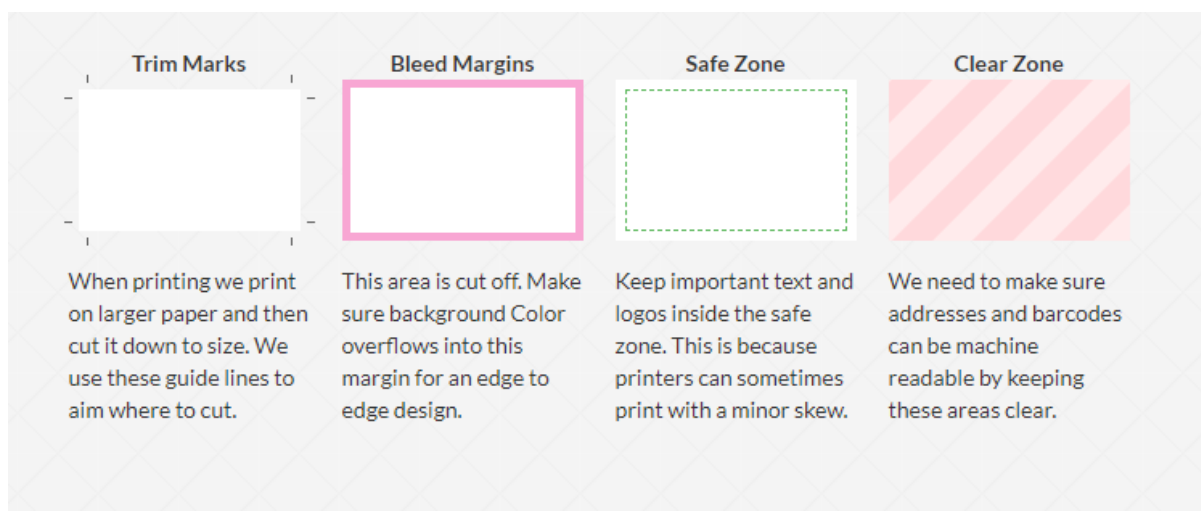
Pink Areas / Green dotted lines

The pink areas and green dotted line show you where it is safe to have content, the pink line represents the bleed margins, which is cut off before sending, and the green dotted lines show you where it is 100% safe to put text / logos / links etc. to ensure they look great and are not lost by the cutting process. See this key below:

Trim Marks	Bleed Margins	Safe Zone	Clear Zone
When printing we print on larger paper and then cut it down to size. We use these guide lines to aim where to cut.	This area is cut off. Make sure background Color overflows into this margin for an edge to edge design.	Keep important text and logos inside the safe zone. This is because printers can sometimes print with a minor skew.	We need to make sure addresses and barcodes can be machine readable by keeping these areas clear.

Something to note, we add our own cutmarks during the process, so **you do not need to add your own crop marks** to your design.

Edge-to-Edge Designs

On most home printers you can only print so close to the edge of the page without being forced to have a white border. With Stannp, if you put anything right against the edge of the page (past the green dotted lines and up to the pink area), it will print completely to the very edge of the page!

Although this is great for edge-to-edge designs there is always a slight variance of a few millimeters due to the accuracy of the page trimming machines. This is common to all commercial printers but because of this we do encourage people to keep important text and images **6mm** (approx. **0.24 inches**) away from the very edge of the page - this applies to **all campaigns**, **whatever the format!**

However, the **unimportant** background parts such as pictures, blocks of color or gradients can go right over the pink areas (past the red hatch marks) and to the page edge!

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The Address Area

The pink and striped area on screen is obviously the mailing address area. This area cannot be changed or edited, and we encourage you to design your mail piece around this rather than over the top. We keep a light boarded area around all addresses, the font and size of the address consistent so that the letters can be easily read by our machines. The advantage of following these rules is we pass on the cost savings to you. The downside is you cannot change the font size or font type of the pink Address Area. But all other fonts can be changed.

Design Tools

Although we will not go into using every detail of the design tools in this guide you will nevertheless notice that you have a large array of tools to help you design your artwork. Most of these are self-explanatory and are used in a similar way to software like Microsoft word. You can: **add text** boxes, **add images**, **add a background image,** and zoom in and out of your design area.

BACKGROUND	INSERT ELEMENTS		PAGES (1 OF 1)			VIEW		SETTINGS
Upload	Text Block	Image	Previous	Next	Add Page	Zoom Out	Zoom In	Settings

One thing to be aware of is on all **8.5x11 Letters** you will need to press the **Add Page** button before you can move between your first page and additional pages. Each page is classed as individual, so you cannot make text flow between one page and the next like it would in a word processor. Instead, you need to make sure that the words on each page fit correctly. The page you are currently on is displayed above the next, previous and add page buttons.

Design tools "Hints and Tips"

Although there is no 'one way' to use the design tools here is a rough list of things that will make your experience easier:
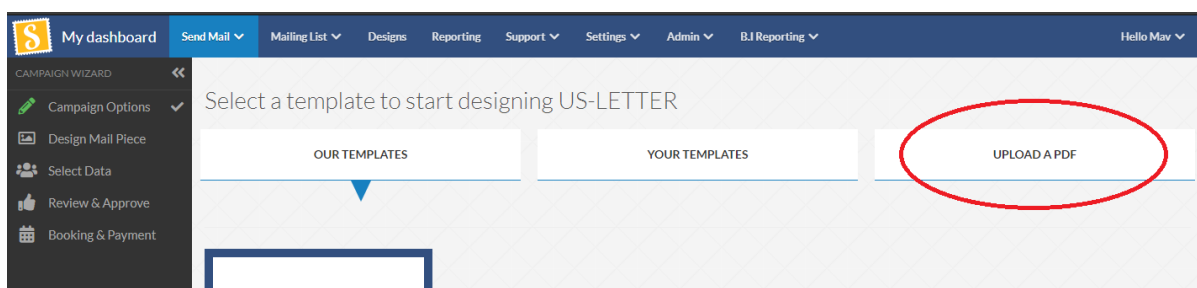
- Follow the design templates for your chosen formats (found on the support page).

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- Use a jpg image as a background, and type most of the copy onto the document using the design tools; this will give you the maximum possible quality for your mailpiece.
- Use TrueType(.ttf) fonts and try not to use multiple styles of the same font (bold/italic/regular) instead upload the regular font and then use the bold and italic design tools to style where needed.
- Talk to us! If you are ever in need of assistance, we are always ready to lend a hand and we can walk you through the process!

You can also use the text tools to add in dynamic content, dates and more! For a deep dive into the design tools and dynamic content, please check out our other guides (found on [the support page](#)).

Uploading a PDF

Sometimes we find that our clients have already designed a letter in Microsoft Word or as a PDF document and cannot upload the letterhead as background images directly. Not to worry! The Stannp platform also allows you to upload PDFs! To upload a PDF, create a new campaign as shown above and then when you reach the design screen, choose 'Upload a PDF' from the list of options:

Then simply drag and drop your letter into the specified area:

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Select a template to start designing US-LETTER

OUR TEMPLATES	YOUR TEMPLATES	UPLOAD A PDF

Drag or click here to upload your file.
Please check the design guidelines below before uploading.

Things to consider when uploading a PDF.

- The letter will still need to follow the template for the format you have chosen, and the address area would preferably be blank.
- If the first page of your pdf does not allow for our address area, we would advise you to either add a blank page to the front of your letter or redesign the mailpiece according to our templates.
- An uploaded PDF is essentially a flat image therefore:
  - None of the text uploaded in the PDF will be editable, meaning if there are spelling or grammatical errors in the letter, you would have to delete the campaign and start again uploading the amended document.
  - Because of the conversion process, often a small amount of image quality is lost.
  - Any dynamic content will be shown exactly as it is in the pdf and will not be replaced with data on the platform.
  - Letters made up of text and images made using our design tools usually look much cleaner and more professional once printed.

Mailing Lists

We have spent a lot of time looking at the design aspects of direct mail but now let us go back to the other piece of the puzzle - the address list. Although following the campaign wizard will let you upload an address list for your artwork, you can do it at any time, even with no letter or card designed!

To do this just click to the Mailing List button and select Recipient Groups:

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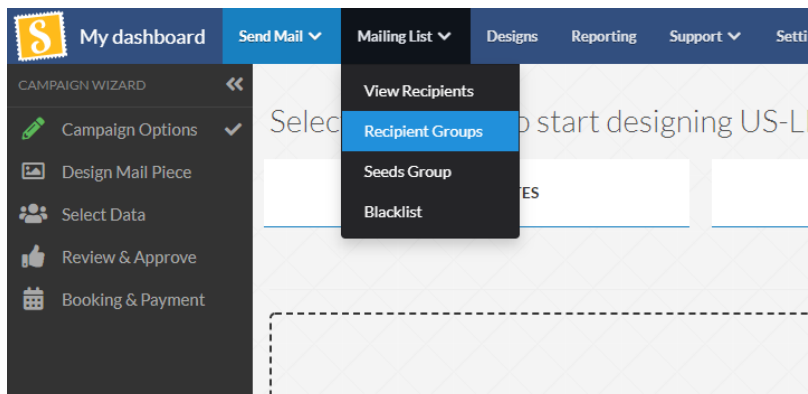Greenwood Village, CO 80111

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Think of **Recipient Groups** as **Address Lists** (as in addresses inside an Excel spreadsheet / CSV file). We call them Groups because you can add to them like you would a folder on your computer. For example, let us say you have one **address list** already uploaded and you wanted to **add** some more addresses to that list, instead of deleting the old list and uploading a new one, you can simply upload the new address to that address **Group**.

Anyway, to upload a new address list click on the **Create A New Group** button and choosing **Import data to a new group** from the dropdown menu that appears.
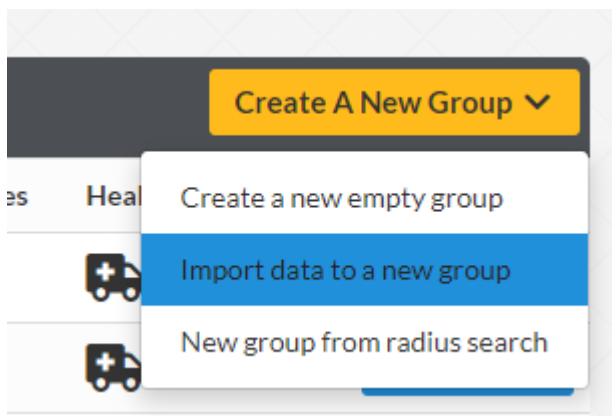
You will now be presented with a drag and drop screen, simply drag your .CSV or Excel file from your computer. Once you have done that this section will appear:

Firstly, our platform analyses your data and shows a count of how many records you have uploaded, in this example there were 4 recipients uploaded (see A).

Then it attempts to automatically determine what to associate the columns with (see B), on the top row are the names you used in your csv/excel document, the dropdowns beneath them are the data columns the platform has chosen for you, you can change these by clicking on the dropdown and choosing another option. In order to get our great prices, we need to verify the addresses you provide with the USPS national database, and for that we need the zip code and first line of the address.

Note: for advanced users, you can add **more than just addresses** to your address lists. For example, you can also add columns containing just about anything such as: **Customer Reference numbers, nicknames, dates** and so on. **These extra columns can all be used to add personalization's to your letters and postcards**. All these should have unique header names and should all also be uploaded as **'Custom Heading'**. If there are any columns you do not wish to upload you can choose **Skip this Column**.

Lastly the platform will show a small sample of the data you uploaded, so that you can see how the new column headings match up to your data and so that you can see exactly what you have uploaded before confirming the creation of the group (see C).

Scrolling down the page you will see the information for your new group:

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On the left you can see two buttons **New Group** and **Existing Group**, as this is presumably the first group you have uploaded, the default **New Group** is exactly what is needed. If you already have a group you would like to add data to, you will need to click **Existing Group**.

On the right-hand side there is the name of the group (this defaults to the name of the csv/excel file you uploaded) which you can change to whatever you would like, however please remember that it is helpful to name it something relevant for future use. In this example I am going to name it **Test Data – 2021**.

Next, we have **How to Check for Duplicates,** this dropdown determines what our platform does to check for duplicates, by default the Stannp platform dedupes by **full name and address**, meaning that two people living at the same house will count as unique recipients, but two records in the data that match both name and address will be counted as a duplicate. There are several other options to choose from, including deduping by initial or just by address, but for now we will stick with the default.

Now what happens when the platform finds a duplicate? The **What shall we do if we find duplicates** dropdown is where you will decide!

Update Duplicates and add to this group is the default option, this means duplicates are combined, with the newer one over-writing the older one, all associated data columns are also overwritten for that record, and then the updated duplicate is added to the recipient group. This is great for a lot of situations however we also have two more options for different circumstances.

Ignore duplicates found in any group will not add any duplicate to the group, meaning that only completely unique data will be added to the group, this is a great option if you only want to send to people you have not sent to before.

Insert all duplicates as unique records will not dedupe at all, this is very useful if you need to send multiple letters to the same name/address.

The final box we have is the **default country,** this will default as **United States**, however if you are sending internationally, you can change this to another country (e.g., Canada, Mexico).

When you have made your choices click **Import Data,** you should now see your group:

Attaching an Address List to your Design

At this stage you should have a letter design and your data uploaded. All we need to do now is attach the data to the letter. Click on the **Send Mail** button and then click **Bulk Campaigns** from the dropdown to see your list of campaigns.

On the right-hand side of the screen next to the campaign you created earlier you should see the following button:

Click that and then **Select** the data group you have previously created from the list of recipient groups:

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Select / upload recipients

YOUR RECIPIENT GROUPS	UPLOAD NEW RECIPIENTS	RADIUS ADDRESS SEARCH	TYPE RECIPIENTS MANUALLY

Select a data group

Group Name	Total Recipients	Verified	Not Verified	Other International	Countries	Health Check	
Test Data - 2021	2	2	0	0	1		Select

You will be presented with this screen:

Here is a breakdown of the different sections:

A – This dropdown allows you to choose whether you send to **all addresses, only verified addresses** or **only unverified addresses**.

B – This filter option allows you to **filter the selected data**, simply click the add filter button and fill in your filter, you can add multiple filters.

C – This option allows you to choose **not to send this campaign to recipients you have previously sent to**, either from specific sends or from all the times you have sent previously.

D – You can set a **maximum number of recipients** here, please be aware that it is advisable to have '**Send to only verified addresses**' selected at the top to make sure you get the best deal on your send. (**Unverified addresses cost more**)

E – The Trigger date section is covered more fully in our Triggered campaigns guide (found here) but essentially this is the section used for rolling / triggered campaigns.

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F – This area shows the rundown of the data you have selected, including how many of your recipients are verified addresses and how many do not, as well as a country breakdown (if you have international data) and a total.
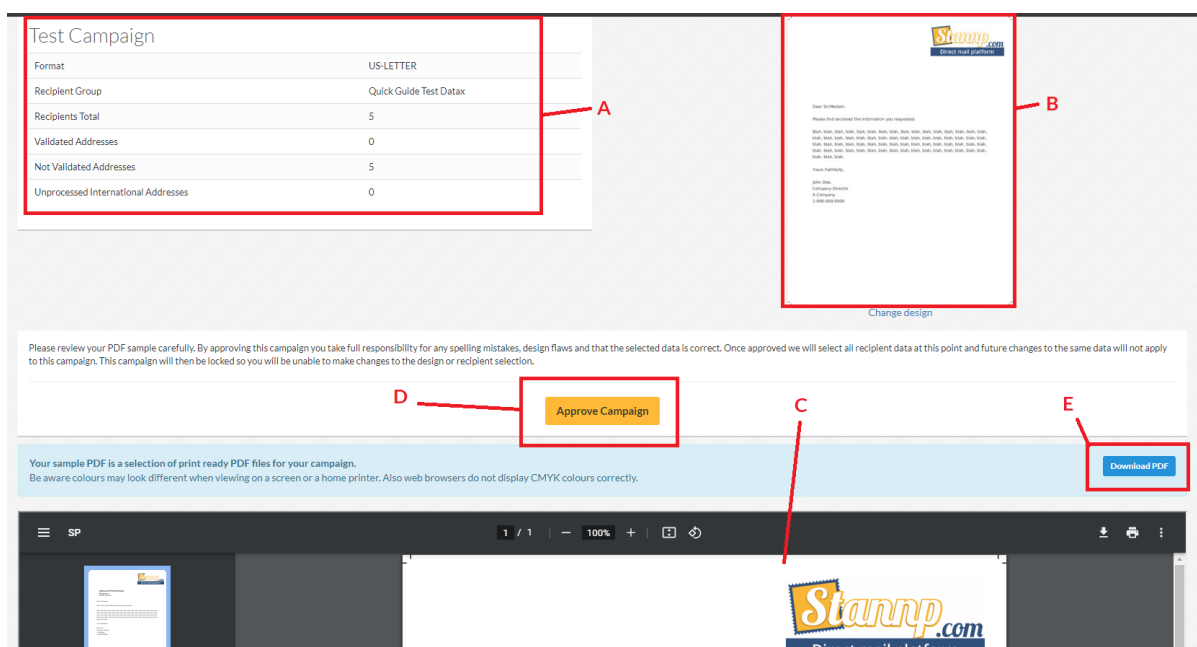
Once you are happy with your choices, click the **Save Selection** button.

Approving your Campaign

If you have not already been sent to the **Approval Page,** then you can go there at any time by clicking **Review & Approve** on the menu bar:
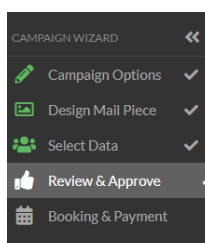
This is the approval page:

A – This section shows the details of the campaign, the name, number of recipients and which recipient group is attached.

B – This is image preview of the design, if you need to change it you can click this to return to the design screen immediately.

C – At the bottom of the screen you will see a rendered PDF sample of your campaign using some of the data you uploaded to give you a clear idea of what will be printed.
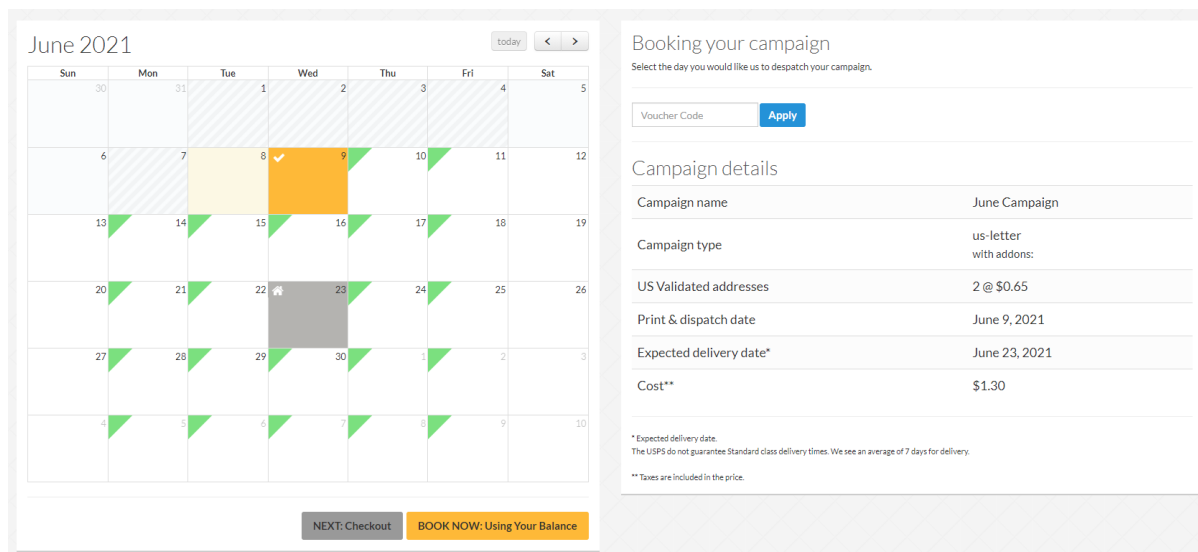
D – When you are happy with the campaign, click **Approve Campaign** to confirm you are happy with what you see in the PDF sample, as it says above the button:"

Please review your PDF sample carefully. By approving this campaign, you take full responsibility for any spelling mistakes, design flaws and that the selected data is correct. Once approved we will select all recipient data at this point and future changes to the same data will not apply to this campaign. This campaign will then be locked so you will be unable to make changes to the design or recipient selection."

E – Here you can download a copy of the PDF sample shown in C to your computer (for your own records etc.)

Booking and Payment

Once you have approved your campaign, simply pick a date from the available dates (available days are marked with a green triangle)

Clicking a date will reveal the final campaign details:

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On the calendar the date you have selected is highlighted in yellow, the expected delivery date is highlighted in grey.

That's it! I hope you have found this introduction helpful. You now know how to create a simple mailing campaign from start to finish. If you would prefer to pay by **BACS** or have any further questions, please email: sam@stannp.com or call: **1-888-321-2148**. We also have an online chat feature and managed account options.

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