

Approved By:

Last Updated:

Status: Active

How to mail from Click2Mail SOP

Why: This SOP was created to teach you how to properly mail from Click2Mail.

When: You can use this SOP every time you need to manually mail packages from Click2Mail.

Where: All our SOPs are run out of Google Drive in the Team Drive /General Business/ Departments/ Standard Operating Procedures

Who: Anyone on the team that will need to refer to this information.

Creating the Letter

Create Letter

- a) 8.5 x 11
- b) Layout: Address on Separate Page
- c) Production Time: Next Day
- d) Print Color: Black & White
- e) Number of Pages: 1
- f) Mail Class: Standard

Create Document

In Configuration , Put Your Name and Business Address as Mailing and Seller's Name as Receiver.

Save in Cart

Tasks Outline

1. Go to <https://click2mail.com>
2. Click Sign in
 - a. Put in your credentials (should be on lastpass)
3. Click on Cart at the top right side of the screen

4. View the proof of each to make sure all information is accurate
 - a. “Click view proof”
 - b. Make sure the seller’s/client’s address is at the top
5. Complete until finish with all sellers/clients

Client Supporting documents are attached or wrong

6. If a clients information is incorrect or not attached
 - a. Check the box on the left side of the screen
 - b. Delete the item
 - i. Will send to edit
 - ii. The items will be edited then send back to cart when completed
7. Click “Proceed to checkout”
8. Select payment method
 - a. Select credit card because it is already on file
 - b. Scroll down and accept the terms of agreement
 - c. Click “Place order now”
9. Only mail our when you have at least 4 mailing in the cart

Final Checks

1. Make sure login information is correct
2. Make sure you attached all documents
3. Log out of the account

Resources/References/Templates

Video Resource of Using Click2Mail:

<https://www.useloom.com/share/bdbb8c7b7a2443749a1998f156dd648e>