

# Fulfillment Checklist

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○ **PROMOTIONAL NAME** \_\_\_\_\_  
\_\_\_\_\_

○ **TYPE OF OFFER**  
Refund \_\_\_\_\_ Cash \_\_\_\_\_ Coupon \_\_\_\_\_ Premium \_\_\_\_\_  
Sample \_\_\_\_\_ Continuity \_\_\_\_\_ Other \_\_\_\_\_

○ **SELECT FULFILLMENT HOUSE** \_\_\_\_\_

○ **DATE OF OFFER**  
Start \_\_\_\_\_ End \_\_\_\_\_ Honor Thru \_\_\_\_\_  
Final Postmark Date \_\_\_\_\_

○ **ESTIMATED RESPONSE LEVEL** \_\_\_\_\_

○ **ORDERS WILL BE RECEIVED BY:**  
Mail \_\_\_\_\_ Telephone \_\_\_\_\_ Mag Tape \_\_\_\_\_ Hard Copy List \_\_\_\_\_  
Bulk Order Forms \_\_\_\_\_ Fax \_\_\_\_\_ Other \_\_\_\_\_

○ **MEDIA AND POST OFFICE BOX #'S**  
Media \_\_\_\_\_ Box Number \_\_\_\_\_ Circulation \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

○ **PROOF OF PURCHASE REQUIRED**  
Type \_\_\_\_\_ Quantity \_\_\_\_\_  
Verified: Yes \_\_\_\_\_ No \_\_\_\_\_ Acceptable Nos. \_\_\_\_\_  
Save Proofs: Yes \_\_\_\_\_ No \_\_\_\_\_  
Final Disposition: Destroy \_\_\_\_\_ Retain \_\_\_\_\_  
Forward To \_\_\_\_\_  
Allow \_\_\_\_\_ % Proofs Short

- **ORDER FORM REQUIRED** Yes \_\_\_\_\_ No \_\_\_\_\_ Allow Copies \_\_\_\_\_
  
- **CASH REGISTER RECEIPT REQUIRED** Yes \_\_\_\_\_ No \_\_\_\_\_  
 Allow Copies \_\_\_\_\_  
 Dated: \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_  
 Store Identified: Yes \_\_\_\_\_ No \_\_\_\_\_  
 Price Circled: Yes \_\_\_\_\_ No \_\_\_\_\_  
 Other \_\_\_\_\_
  
- **PAYMENT REQUIRED** \$ \_\_\_\_\_  
 Cash \_\_\_\_\_ Check \_\_\_\_\_ Money Order \_\_\_\_\_  
 Credit Card \_\_\_\_\_ AMEX \_\_\_\_\_ Visa \_\_\_\_\_ MasterCard \_\_\_\_\_ Other \_\_\_\_\_  
 Hold for Check Clearance: \_\_\_\_\_ Days  
 Money Shortage Allowed: \$ \_\_\_\_\_  
 Check Drawn On \_\_\_\_\_ Client \_\_\_\_\_  
 Fulfillment House Bank \_\_\_\_\_  
 Micro # \_\_\_\_\_  
 Return Overpayment \_\_\_\_\_ Amount Over \$ \_\_\_\_\_  
 Other \_\_\_\_\_
  
- **DUPLICATE ELIMINATION**  
 Limit \_\_\_\_\_ Per Household \_\_\_\_\_  
 Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 Item \_\_\_\_\_  
 Respond to duplicate: Yes \_\_\_\_\_ No \_\_\_\_\_  
 Return with \_\_\_\_\_ Without \_\_\_\_\_ Proofs \_\_\_\_\_
  
- **ACCEPT POSTAGE DUE** Yes \_\_\_\_\_ No \_\_\_\_\_
  
- **ORDER ENTRY**  
 Key Full First Name: Yes \_\_\_\_\_ No \_\_\_\_\_  
 Key titles: Yes \_\_\_\_\_ No \_\_\_\_\_  
 Telephone number: \_\_\_\_\_  
 Age \_\_\_\_\_ Sex \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Other \_\_\_\_\_  
 Retain names for later use: Yes \_\_\_\_\_ No \_\_\_\_\_  
 Number of items offered: \_\_\_\_\_
  
- **PRODUCE**  
 Label: Yes \_\_\_\_\_ No \_\_\_\_\_  
 With Indicia \_\_\_\_\_  
 With forwarding and return postage guarantee: \_\_\_\_\_  
 For Self-mailer coupon \_\_\_\_\_  
 Check: yes: \_\_\_\_\_ No \_\_\_\_\_

Self Mailer \_\_\_\_\_  
 Insertable \_\_\_\_\_  
 Post Card \_\_\_\_\_  
 Laser Produced \_\_\_\_\_  
 W/letter copy \_\_\_\_\_ Copy Supplied by \_\_\_\_\_ W/Coupon \_\_\_\_\_  
 Other \_\_\_\_\_  
 Checks supplied by: Client \_\_\_\_\_ Fulfillment House \_\_\_\_\_ Other \_\_\_\_\_  
 Coupon: Yes \_\_\_\_\_ No \_\_\_\_\_  
 Self Mailer \_\_\_\_\_ Insertable \_\_\_\_\_ Other \_\_\_\_\_  
 Coupons supplied by: Client \_\_\_\_\_ Fulfillment House \_\_\_\_\_ Other \_\_\_\_\_

○ **PREMIUM MERCHANDISE**

Items \_\_\_\_\_  
 \_\_\_\_\_

Mailer packed: Yes \_\_\_\_\_ No \_\_\_\_\_

Mailer required:

Envelope \_\_\_\_\_ Utility Bag \_\_\_\_\_ Padded Bag \_\_\_\_\_

Poly Bag \_\_\_\_\_ Chipboard Mailer \_\_\_\_\_ Corrugated Mailer \_\_\_\_\_

150# Test \_\_\_\_\_ 200# Test \_\_\_\_\_ Other \_\_\_\_\_

Size: Length \_\_\_\_\_ Width \_\_\_\_\_ Height \_\_\_\_\_

Weight \_\_\_\_\_ Pounds \_\_\_\_\_ Ounces \_\_\_\_\_

(Supply for each item)

How merchandise will be received:

Palletized: \_\_\_\_\_ Qty. per pallet \_\_\_\_\_

Container: \_\_\_\_\_ Qty. per container \_\_\_\_\_

Skids: \_\_\_\_\_ Qty. per skid \_\_\_\_\_

Loose Floor Pack \_\_\_\_\_ Qty. per truck \_\_\_\_\_

○ **PACKING AND SHIPPING**

Prepacked \_\_\_\_\_ Pack each item separately \_\_\_\_\_

Pick and bulk pack \_\_\_\_\_

Other \_\_\_\_\_

Include bounce-back insert \_\_\_\_\_

Bounce-back Description \_\_\_\_\_

Ship via:

Third Class Bulk \_\_\_\_\_ UPS \_\_\_\_\_ Signature Required \_\_\_\_\_

Parcel Post \_\_\_\_\_ Regular 3rd Class \_\_\_\_\_ First Class \_\_\_\_\_

Return Receipt \_\_\_\_\_ Insured \_\_\_\_\_ Amt. \$ \_\_\_\_\_

Air \_\_\_\_\_ Overnight \_\_\_\_\_ 2nd Day \_\_\_\_\_ Other \_\_\_\_\_

○ **MISCELLANEOUS**

Standard Activity Report \_\_\_\_\_

Special Activity Report \_\_\_\_\_

Frequency \_\_\_\_\_

Wats Line Required: Yes \_\_\_\_\_ No \_\_\_\_\_

Geographical Limitations: \_\_\_\_\_  
\_\_\_\_\_

Customer Service:

Replace non-receipt automatically w/record \_\_\_\_\_

Request proof of payment \_\_\_\_\_

Check against previous complaint file \_\_\_\_\_

Use generic customer service letter \_\_\_\_\_

Final date for handling consumer mail \_\_\_\_\_

Supplied by client \_\_\_\_\_ Other \_\_\_\_\_

Special packaging Requirements \_\_\_\_\_

Special Reports Required:

Proof of purchase \_\_\_\_\_ by size \_\_\_\_\_ by type \_\_\_\_\_

Frequency \_\_\_\_\_

State \_\_\_\_\_ Frequency \_\_\_\_\_

Media \_\_\_\_\_

Customer Service \_\_\_\_\_ Type of Letter \_\_\_\_\_

How Handled \_\_\_\_\_

Inventory Status \_\_\_\_\_ Frequency \_\_\_\_\_

Projected requirements \_\_\_\_\_

File of all respondents \_\_\_\_\_ Hard copy \_\_\_\_\_

On Tape \_\_\_\_\_ Frequency \_\_\_\_\_

Other: \_\_\_\_\_

○ **SPECIAL REQUIREMENTS**

\_\_\_\_\_  
\_\_\_\_\_