

# How to Add Exclusions to a Marketing Effort

**Step 1.** Within your marketing effort, click on the **DME Dashboard** tab and scroll down to find the **Contact rule exclusions** section. Then click **Edit**.

The screenshot shows the 'Direct Marketing Efforts' interface for 'CAES - 2019 March Newsletter'. The 'DME Dashboard' tab is selected. The 'Contact rule exclusions' section is visible, with an 'Edit' button highlighted by a red arrow.

| Overview          |                       | Status            | History                |
|-------------------|-----------------------|-------------------|------------------------|
| Template:         | Simple Email Template | Status:           | File exported          |
| Effort ID:        | 14,028                | Segments:         | 1                      |
| Appeal:           | CAES19                | Packages:         | 1                      |
| Due date:         |                       | Segment quantity: | 50                     |
| Launch date:      | 3/8/2019              | Seed quantity:    | 1 (1 seed x 1 package) |
| Description:      |                       | Total quantity:   | 51                     |
| Owner:            | Leslie K West         |                   |                        |
| Budget:           | \$0.00                |                   |                        |
| Expected revenue: | \$0.00                |                   |                        |
| Total expenses:   | \$0.00                |                   |                        |
| Setup started:    |                       | Setup started:    | 3/6/2019               |
| Counts generated: |                       | Counts generated: | 3/6/2019 ✓             |
| File exported:    |                       | File exported:    | 3/6/2019 ✓             |
| Activated:        |                       | Activated:        | 3/7/2019 ✓             |
| Refreshed:        |                       | Refreshed:        | --                     |

Summary Segments Universe Exclusions Effort Settings Basic Information Revenue Revenue Pivot Table **DME Dashboard**

**Contact rule exclusions** Edit

Exclude constituents with the following solicit codes:

| Solicit code          | Locked |
|-----------------------|--------|
| Do Not Email          | ✓      |
| Do Not Solicit        |        |
| No University Contact | ✓      |

Consider exclusions as of: Today

**Important Note:** Choosing the correct Solicit Codes depends heavily on which unit you are from and what type of communication you are sending. Read the next lines carefully to access the correct instructions for your situation.

If you are sending an EMAIL marketing effort that IS NOT a solicitation, **follow the instructions in GREEN.**

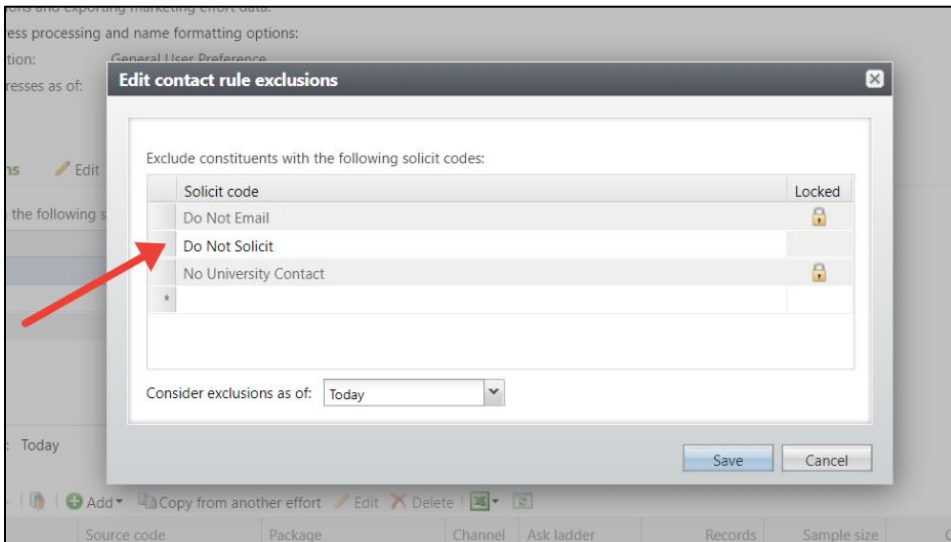
If you are sending an EMAIL marketing effort that IS a solicitation, **follow the instructions in TEAL.**

If you are sending a MAIL marketing effort that IS NOT a solicitation, **follow the instructions in PURPLE.**

If you are sending a MAIL marketing effort that IS a solicitation, **follow the instructions in RED.**

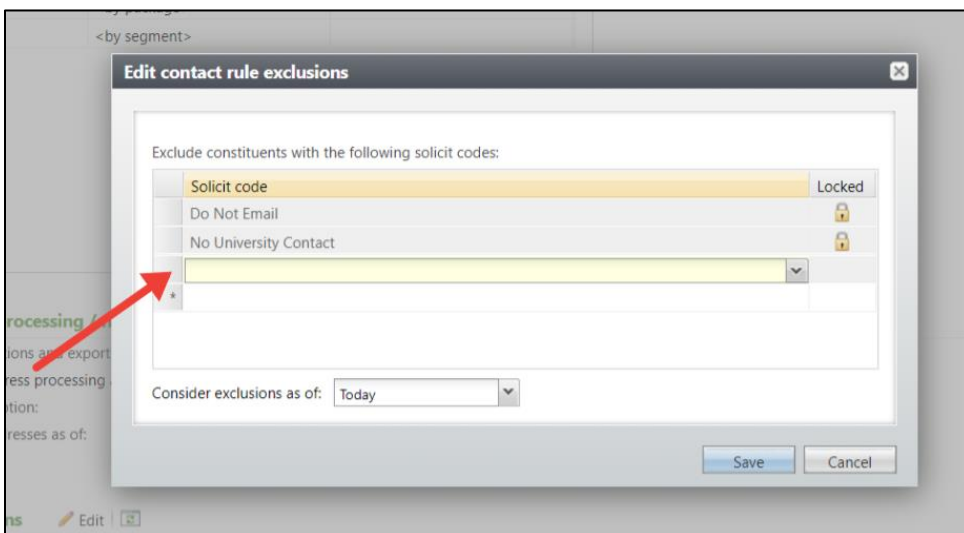
## EMAIL that IS NOT a solicitation

**Step 2.** Click the grey square next to **Do Not Solicit** to highlight the row in blue. Then press **Delete** on your PC keyboard or **Function + Delete** on your MAC.



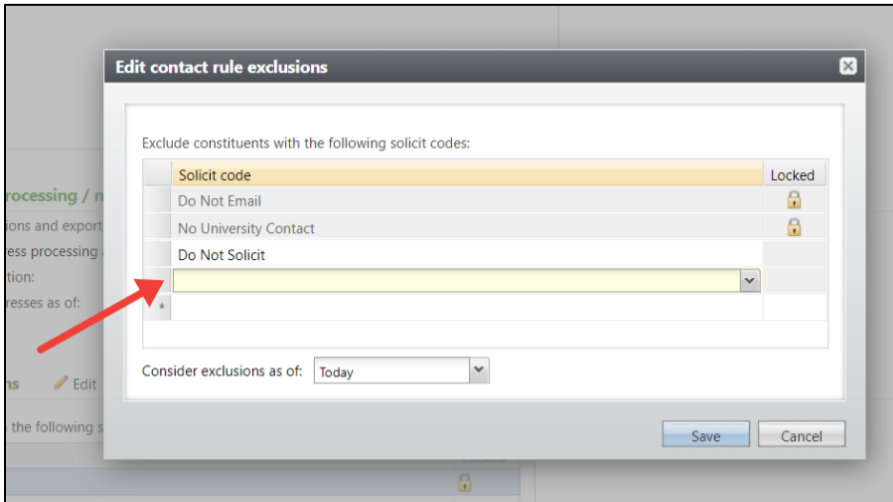
**Step 3.** Click into the blank field underneath No University Contact and choose the **Do Not Email** specific to your school/unit. Your final exclusion codes should include the **general Do Not Email**, the **unit-specific Do Not Email**, and **No University Contact**.

Click **Save** when you are finished.

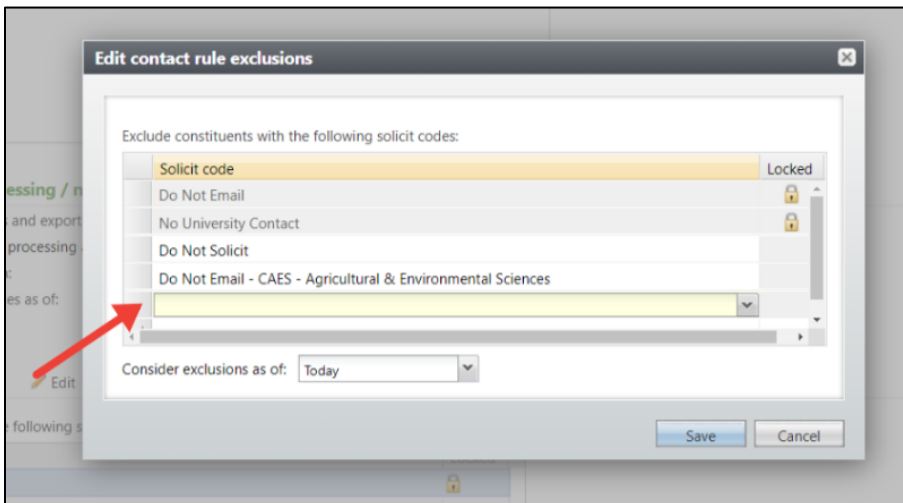


## EMAIL that IS a solicitation

**Step 2.** Click into the first blank field and choose the **Do Not Email** specific to your school/unit.

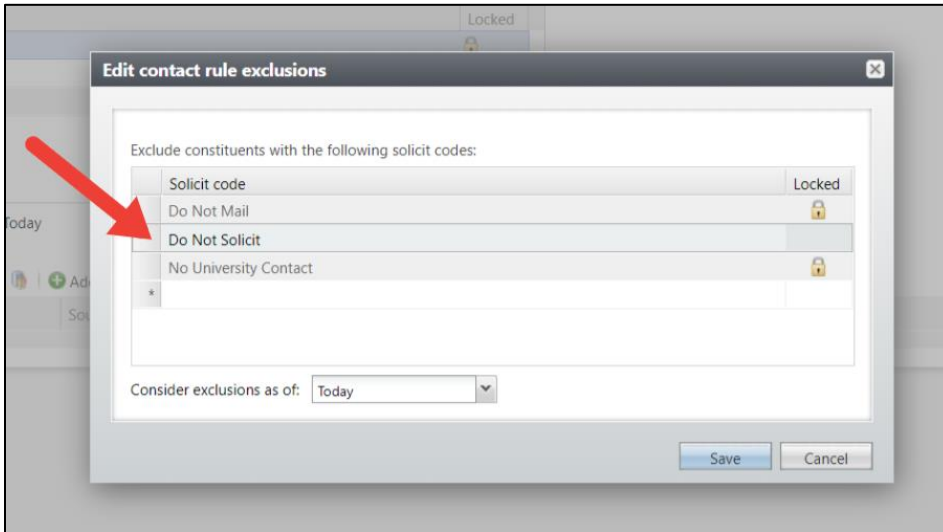


**Step 3.** Click into the next blank field and choose the **Do Not Solicit** specific to your school/unit. Your final exclusion codes should include the general Do Not Email, your unit-specific Do Not Email, the general Do Not Solicit, your unit-specific Do Not Solicit, and No University Contact. Click **Save** when you are finished.

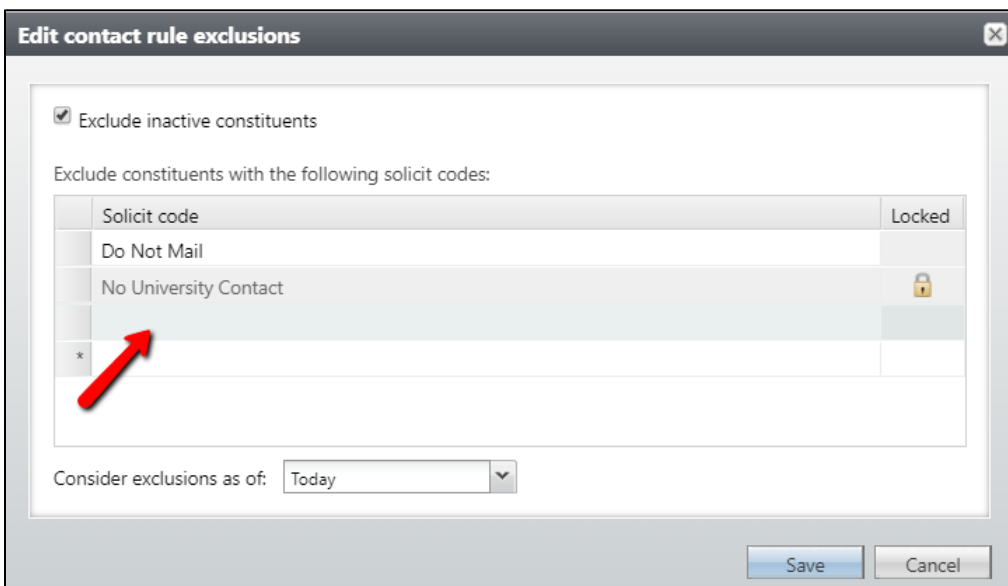


## MAIL that IS NOT a solicitation

**Step 2.** Click the grey square next to **Do Not Solicit** to highlight the row in blue. Then press **Delete** on your PC keyboard or **Function + Delete** on your MAC.

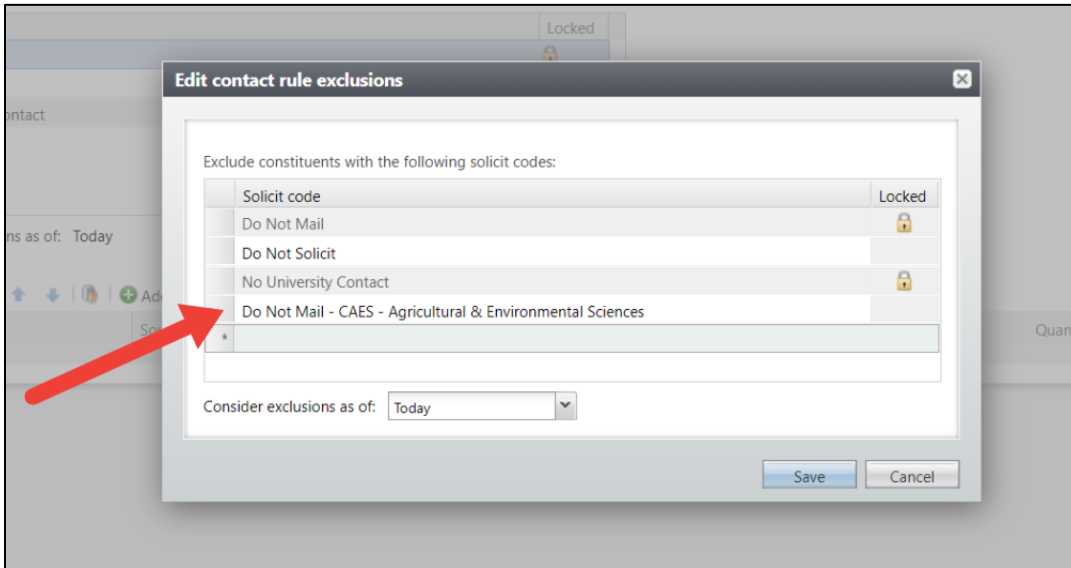


**Step 3.** Click into the blank field underneath No University Contact and choose the **Do Not Mail** specific to your school/unit. Your final exclusion codes should include the **general Do Not Mail**, the **unit-specific Do Not Mail**, and **No University Contact**. Click **Save** when you are finished.

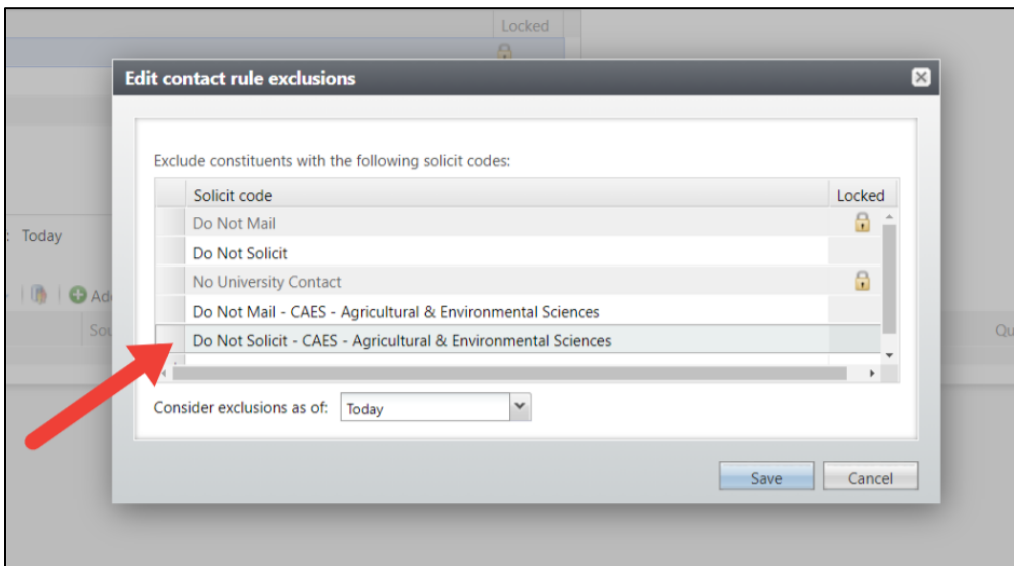


## MAIL that IS a solicitation

**Step 2.** Click into the blank field underneath No University Contact and choose the **Do Not Mail** specific to your school/unit.



**Step 3.** Click into the next blank field and choose the **Do Not Solicit** specific to your school/unit. Click **Save** when you are finished.



If you have any questions about this instructional guide, or need additional assistance, please contact the Client Services team at [askit@uga.edu](mailto:askit@uga.edu).

*This document was last updated on 6/4/21.*