

How to Add an Email Communication to an Event

Step 1. Within your event in GAIL, select the **Invitations** tab, then click **Add**.

ASRV - Emily's Awesome Event

Event date: 4/21/2019 Status: Active

Site: Annual Giving Location: UGA Founders Memorial Garden 325 S. Lumpkin Street Athens, GA 30602

Room/Unit: Contact: West, Ms. Leslie Kirsten Coordinator: Category: Social

Lookup ID: 8-10005931

Event expenses: Expense budget: \$4,300.00 Agreed expenses: \$3,840.00 Amount paid: \$3,840.00 89% of budget

Event capacity: Event capacity: 300 Will attend: 33 Will not attend: 0 11% of capacity

Tasks/Coordinators Registrations Registrants-More Details Pending Registrations Regret Responses **Invitations** Options Speakers Expe

Invitations (0) **Add** More

Name Mail date Description

Step 2. **Name** your communication beginning with your naming convention. The name should also include the event and type of communication. (Ex. COE – 2019 Homecoming Tailgate Save the Date). Provide a brief **description** and choose a **mail date**. The mail date is the day you plan on sending your email. (This will not pre-schedule your email to send.)

General **Processing Options**

Name: PHAR - 2019 Alumni Reception Invitatic

Description: Mail invitation for the alumni reception

Mail date: 4/26/2019

Step 3. Click on the **Processing Options** tab and click **Send through email only**. Then click the search icon next to the **Email package** field.

General **Processing Options**

How do you want to send your invitation?

☐ Send through both mail and email, according to each constituent's preferences.
If the constituent does not have a preference, attempt to send: Email

☒ **Send through email only**

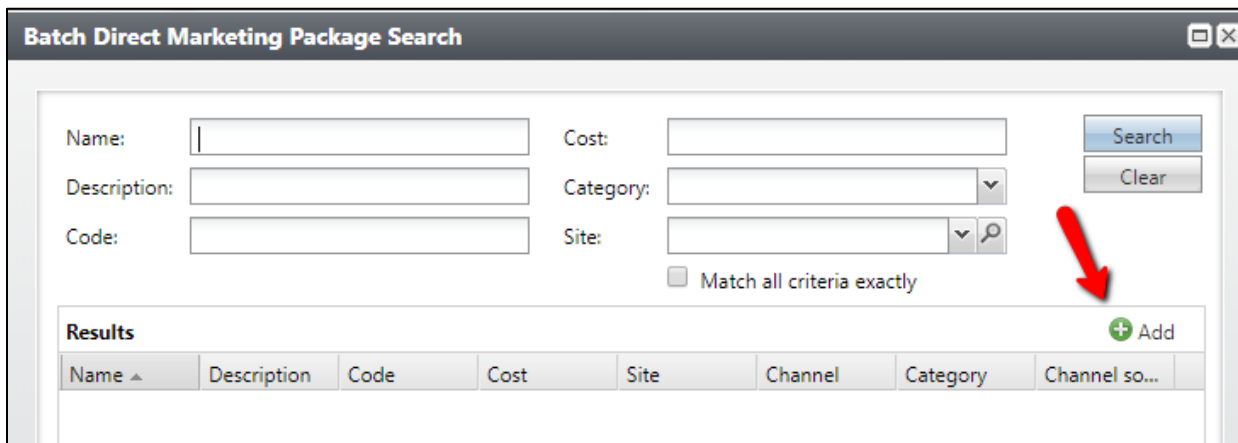
☐ Send through mail only

Select the package(s) for your invitation

Email package: [Search] Cost: \$0.00 Content:

Mail package: [Search] Cost: \$0.00 Content:

Step 4. When the new window appears, click the **Add** button.



The screenshot shows a window titled "Batch Direct Marketing Package Search". It contains several input fields: "Name:", "Description:", "Code:", "Cost:", "Category:", and "Site:". There are also "Search" and "Clear" buttons. A red arrow points to a green "+ Add" button located next to the "Results" section. Below the "Results" section is a table with columns: Name, Description, Code, Cost, Site, Channel, Category, and Channel so...

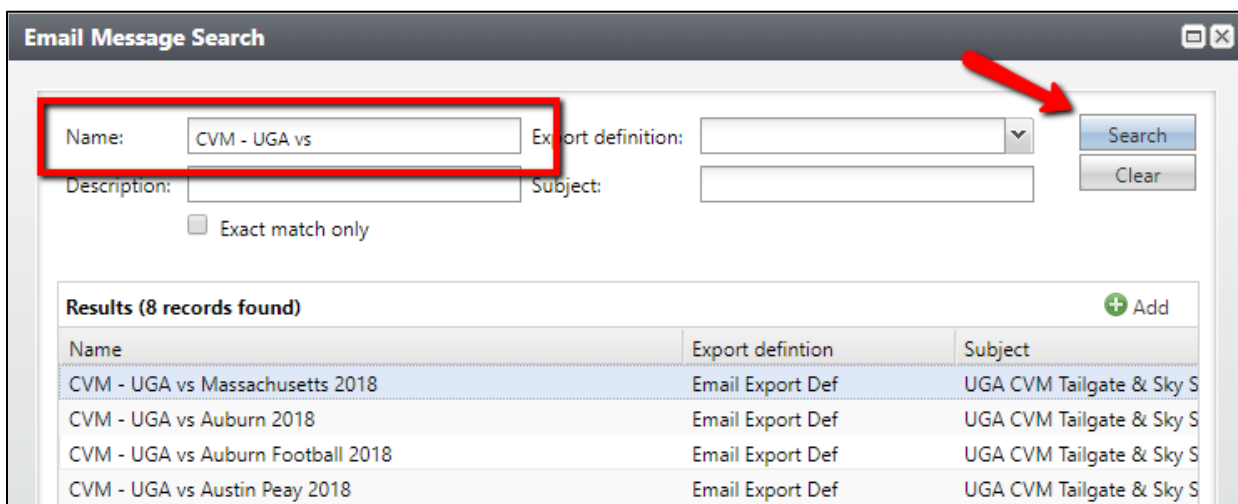
Name	Description	Code	Cost	Site	Channel	Category	Channel so...
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Step 5. At the bottom of the new screen, click the search icon next to the **Message** field.



The screenshot shows a form titled "Primary content". It has two main fields: "Message:" and "Export definition:". Each field has a search icon (magnifying glass) and an edit icon (pencil) to its right. A red arrow points to the search icon next to the "Message:" field.

Step 6. Search for and select the name of your **BEE** email.



The screenshot shows a window titled "Email Message Search". It contains input fields for "Name:", "Description:", "Subject:", and "Export definition:". There are "Search" and "Clear" buttons. A red arrow points to the "Search" button. Below the search fields is a "Results (8 records found)" section with a table. The first row of the table is highlighted in blue.

Name	Export definition	Subject
CVM - UGA vs Massachusetts 2018	Email Export Def	UGA CVM Tailgate & Sky S
CVM - UGA vs Auburn 2018	Email Export Def	UGA CVM Tailgate & Sky S
CVM - UGA vs Auburn Football 2018	Email Export Def	UGA CVM Tailgate & Sky S
CVM - UGA vs Austin Peay 2018	Email Export Def	UGA CVM Tailgate & Sky S

Step 7. Name your package to match the email name you just chose in *Step 6*.

Provide a brief **description** and choose your school/unit from the **Site** drop-down menu.

Choose **School/Unit** from the Category field and **Package** from the Package code field.

In the Channel code field, choose **Email**.

Package details

Name: CVM - UGA vs Massachusetts 2018

Description: Email invitation to football game

Site: Veterinary Medicine

Category: School/Unit

Package code: Package FMG

Channel code: Email E

Step 8. Click **Save** when you are finished.

Package details

Name: CVM - UGA vs Massachusetts 2018

Description: Email invitation to football game

Site: Veterinary Medicine

Category: School/Unit

Package code: Package FMG

Channel code: Email E

Costs

Base cost: \$0.0000 Distribution: Per piece

Additional content cost: \$0.0000

Total per piece cost: \$0.0000

Primary content

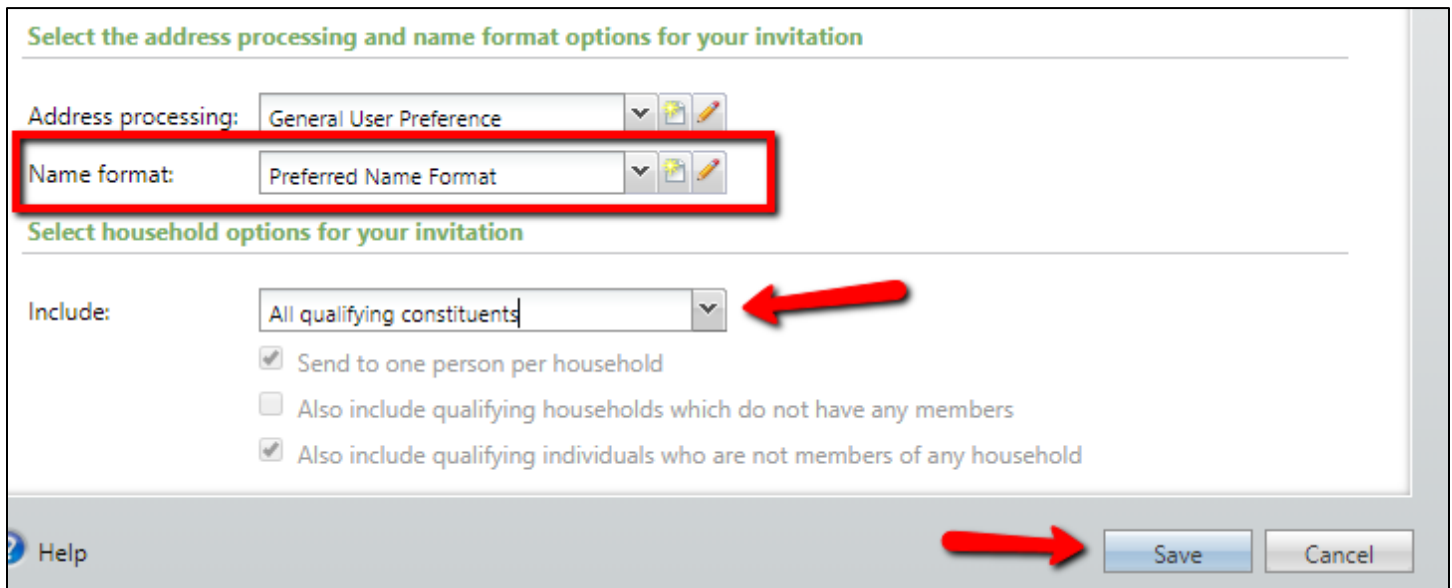
Message: CVM - UGA vs Massachusetts 2018

Export definition: Email Export Def

Help Save Cancel

Step 9. If you included a salutation field in your BEE email, you can choose which salutation you want to use in the *Name format* field. Leaving the name format at **Preferred Name Format** will address the constituent as their title + last name (Mr. Smith). If you want to address the constituent more informally (John), change the name format to **ASRV – Informal Email Salutations**.

You only need to adjust the Name format field if you have used a salutation in BEE.



The screenshot shows a web interface for configuring invitation options. It is divided into two main sections: "Select the address processing and name format options for your invitation" and "Select household options for your invitation".

In the first section, there are two dropdown menus. The first is labeled "Address processing:" and is set to "General User Preference". The second is labeled "Name format:" and is set to "Preferred Name Format". This second dropdown menu is highlighted with a red rectangular box. To the right of the "Name format:" dropdown, there is a red arrow pointing towards it.

In the second section, there is a dropdown menu labeled "Include:" which is currently set to "All qualifying constituents". A red arrow points to this dropdown menu. Below this dropdown are three checkboxes:

- ☒ Send to one person per household
- ☐ Also include qualifying households which do not have any members
- ☒ Also include qualifying individuals who are not members of any household

At the bottom of the interface, there is a "Help" link on the left and two buttons, "Save" and "Cancel", on the right. A red arrow points to the "Save" button.

Step 10. In the section on who to include, change the drop-down menu to **All qualifying constituents**. Then click **Save**.

If you have any questions about this instructional guide or need additional assistance, please contact Client Services at askit@uga.edu.

This document was last updated on 4/24/2019.