

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 Lookup ID: 8-10005931

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

Room/Unit:

Contact: West, Ms. Leslie Kirsten

Coordinator:

Category: Social

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:

Send through email only

Send through mail only

Select the package(s) for your invitation

Email package: Cost: \$0.00 Content:

Mail package: Cost: \$0.00 Content:

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

Batch Direct Marketing Package Search

Name: Cost: Search
Description: Category: Clear
Code: Site: Match all criteria exactly

Results + Add

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.

Primary content

Message:

Export definition:

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

Email Message Search

Name: CVM - UGA vs Export definition: Search
Description: Subject: Clear
 Exact match only

Results (8 records found) + Add

Name	Export defintion	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:

Description:

Site:

Category:

Package code:

Channel code:

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

Package details

Name:

Description:

Site:

Category:

Package code:

Channel code:

Costs

Base cost: Distribution:

Additional content cost:

Total per piece cost:

Primary content

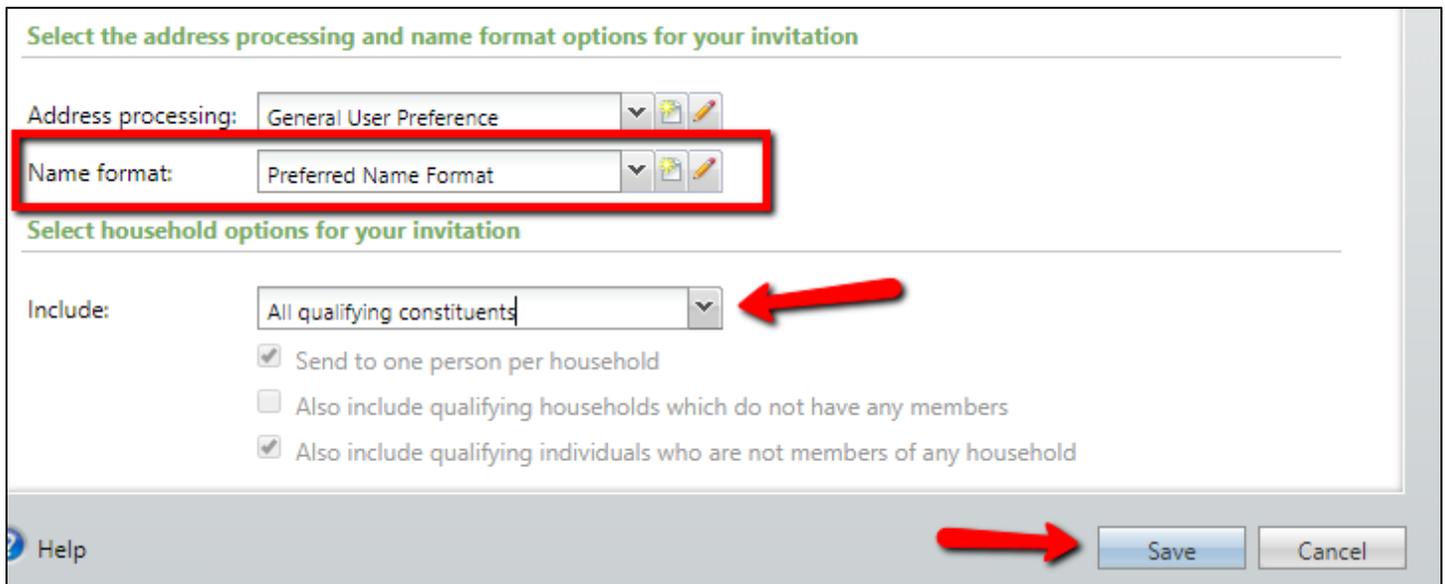
Message:

Export definition:

Help 

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".

- Address processing:** A dropdown menu is set to "General User Preference".
- Name format:** A dropdown menu is set to "Preferred Name Format". This field is highlighted with a red rectangular box.
- Select household options for your invitation:**
 - Include:** A dropdown menu is set to "All qualifying constituents". A red arrow points to this dropdown.
 - 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 "Save" and "Cancel" buttons 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.