

# How to Calculate a Marketing Effort

**Step 1.** Within your marketing effort, click on **Calculate Segment Counts** at the top-left corner of the page.

Direct Marketing Efforts			
PSO - Leslie's Marketing Effort			
Overview			
Template:	Simple Email Template		
Effort ID:	12,754	Owner:	Leslie K West
Appeal:	PSO19	Budget:	\$0.00
Due date:	9/28/2018	Total expenses:	--
Launch date:	9/28/2018	Expected revenue:	--
Description:			

Status	
Status:	Setup started
Segments:	1
Packages:	1
Segment quantity:	--
Seed quantity:	1 (1 seed x 1 package)
Total quantity:	--

**Step 2.** When the new window appears, make sure both processing options boxes are checked. Then click **start**.

Calculate segment counts to update the various counts for a communication including the total number of records, expenses, and expected revenue. Run this process periodically to reflect any changes made to the universe, segment, exclusions, contact rules, and address processing options since the last calculation process.

Processing options	Last run
<input checked="" type="checkbox"/> Refresh all selections used in the communication <i>Refreshes all selections used in the segments, universe, and exclusions for the communication. This process requires additional time, but produces the most up-to-date results for the communication criteria.</i>	Not run
<input checked="" type="checkbox"/> Capture source analysis rule (SAR) data for all recipients <i>Overwrites any source analysis rule (SAR) data previously captured for the communication.</i>	Not run

Start Cancel

After the process is complete you will see the number of counted records. This is the number of constituents that your communication will send to. If this number seems incorrect, please contact [askit@uga.edu](mailto:askit@uga.edu) for additional assistance.

**Step 3.** Return to your main marketing effort page by clicking the green “Go to” link in the top-left corner of the page.

The screenshot displays a web application interface. On the left, a sidebar contains a 'Tasks' section with three items: 'Start process', 'Edit process', and 'Go to PSO - Leslie's Marketing Effort'. A red arrow points to the 'Go to' link. Below this are sections for 'Shortcuts', 'Recent searches', and 'Recently accessed'. The main content area is titled 'Marketing Effort Segment Record Count Calculation Status'. It shows 'Effort: PSO - Leslie's Marketing Effort' and 'Description:'. Below this are tabs for 'Recent Status' and 'History'. The 'Recent status' section shows a 'Status: Completed' with a green checkmark icon, highlighted by a red box. Below this, a table of details is shown:

Started by:	MYID\lkwest	Server name:	FA-GAILTRNAP2
Started:	9/27/2018 9:17:27 AM	Total records processed:	12
Ended:	9/27/2018 9:19:06 AM	Number of exceptions:	0
Duration:	1 minute 39 seconds	Records successfully processed:	12

The 'Total records processed: 12' value is also highlighted by a red box.

**Important Note:** If you change anything about your marketing effort (ex. adding/removing segments, adding/removing exclusions, adding seeds) you will need to re-calculate. This process can be done multiple times if needed.

*This document was last updated on 7/9/21.*