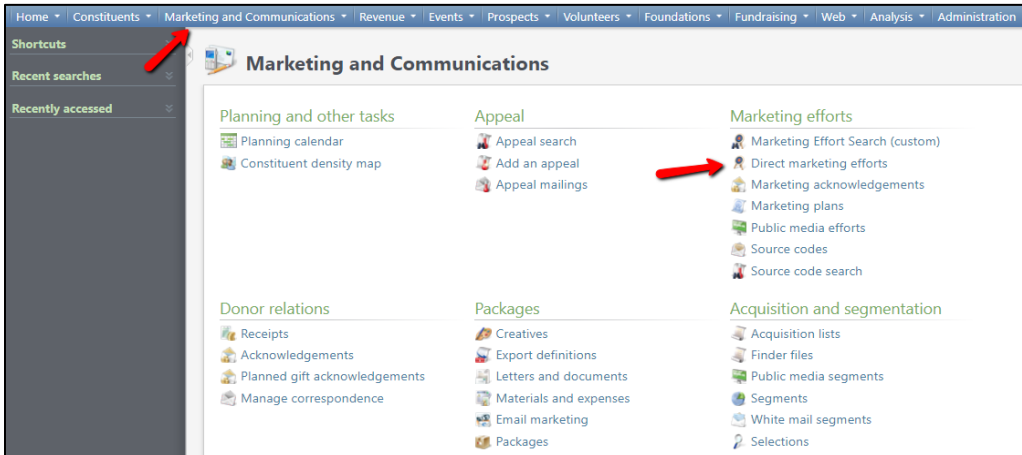


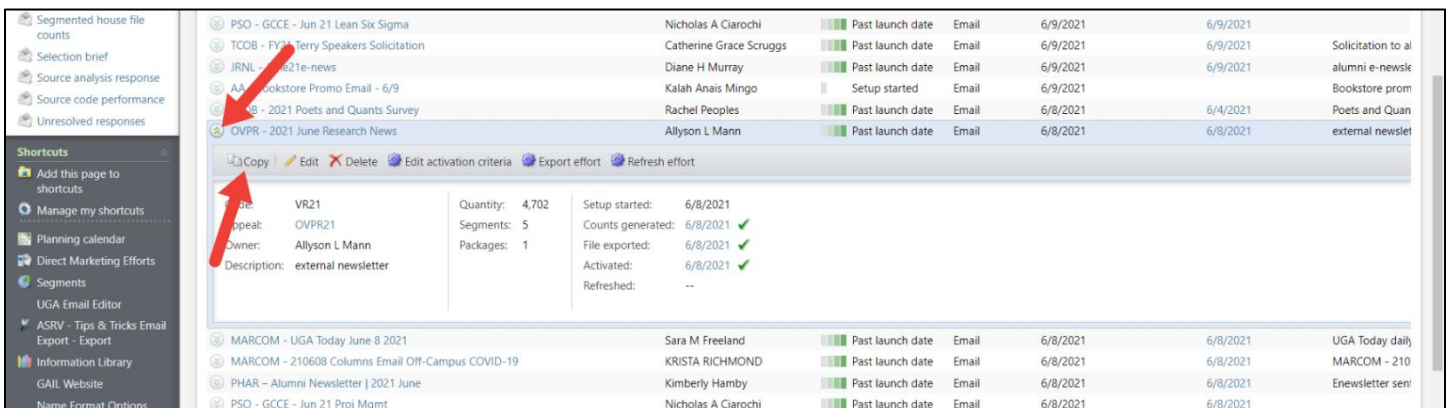
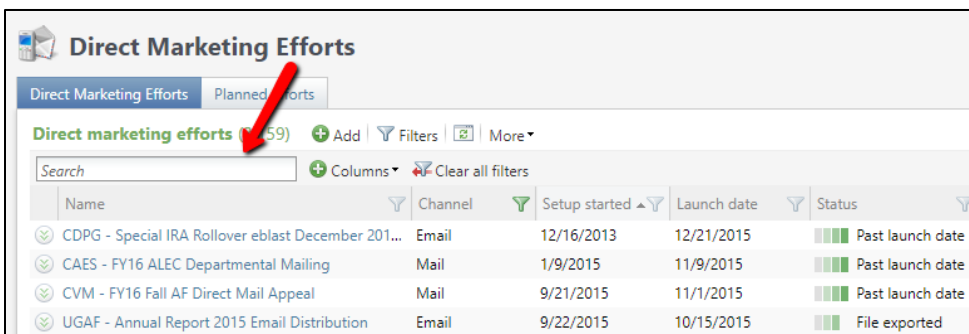
# How to Copy a Marketing Effort

**Important Note:** You can only copy marketing efforts with matching channels. For example, you cannot copy an email marketing effort and change it to a postal mail marketing effort.

**Step 1.** Navigate to the marketing and communications functional area in GAIL and click **Direct Marketing Efforts**.



**Step 2.** Search for the marketing effort you want to copy. When you've found it in the results list, click the drop-down arrow next to the name and click **Copy**.



**Step 3.** Find your new copied marketing effort in the results list and click on it.

Name	Owner
OVPR - 2021 June Research News	Allyson L Mann
OVPR - 2021 June Research News - Copy	Emily J Clary
OVPR - 2021 May Research Matters	Amy Ware
OVPR - 2021 May Research News	Allyson L Mann
OVPR - 2021 May Research News VPs	Allyson L Mann
OVPR - 2021 April Research Matters	Amy Ware

**Step 4.** Click **Edit marketing effort.**

Home | Constituents | Marketing and Communications | Revenue | Events | Memberships | Prospects | Volunteers | Foundations | Fundr

Tasks

- Edit marketing effort
- Delete effort
- Request a selection
- Create/edit an email
- Create/edit a package
- Create/edit a segment
- Calculate segment counts
- Activate marketing effort
- Export effort

Testing

- Test efforts

Direct Marketing Efforts

### OVPR - 2021 June Research News - Copy

**Overview**

Template:	Simple Email Template	Status:	Setup started
Effort ID:	23,367	Owner:	Emily J Clary
Appeal:	OVPR21	Budget:	\$0.00
Due date:	6/8/2021	Total expenses:	--
Launch date:	6/8/2021	Expected revenue:	--
Description:	external newsletter	Segments:	5
		Packages:	1
		Segment quantity:	--
		Seed quantity:	1 (1 seed x 1 p)
		Total quantity:	--

DME Dashboard | Effort Settings | Exclusions | Summary | Segments | Universe | Basic Information | Revenue

Source code | Edit | [Icon]

**Step 5.** Update the general information to reflect the new marketing effort. Click **save** when finished. **Important note:** Make sure your appeal ends with the correct fiscal year.

**Edit marketing effort**

**General information**

Template: Simple Email Template

Name: OVPR - 2021 July Research News

Description: external email newsletter on research projects at UGA

Appeal: OVPR21

Site: Research

Due date: 7/22/2021

Launch date: 7/22/2021

**Additional options**

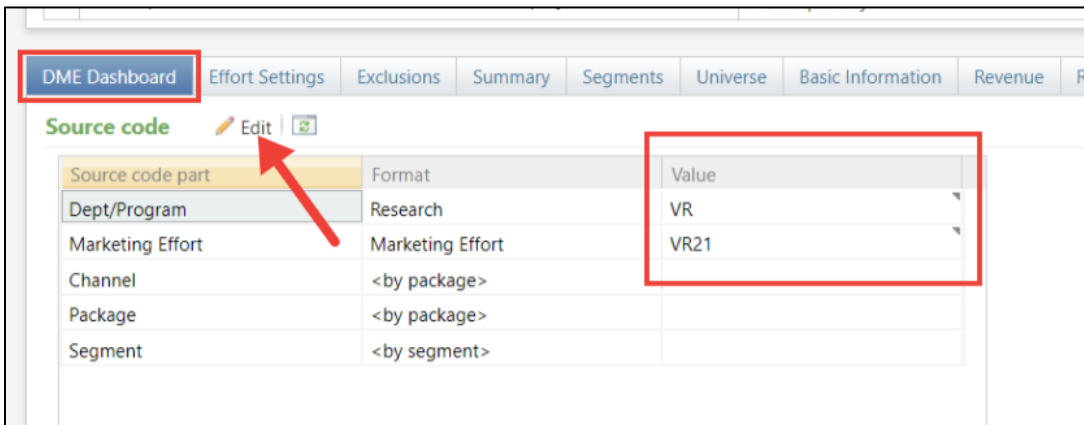
For this marketing effort, include options to:

- Allow the exclusion of constituents who received previous communications

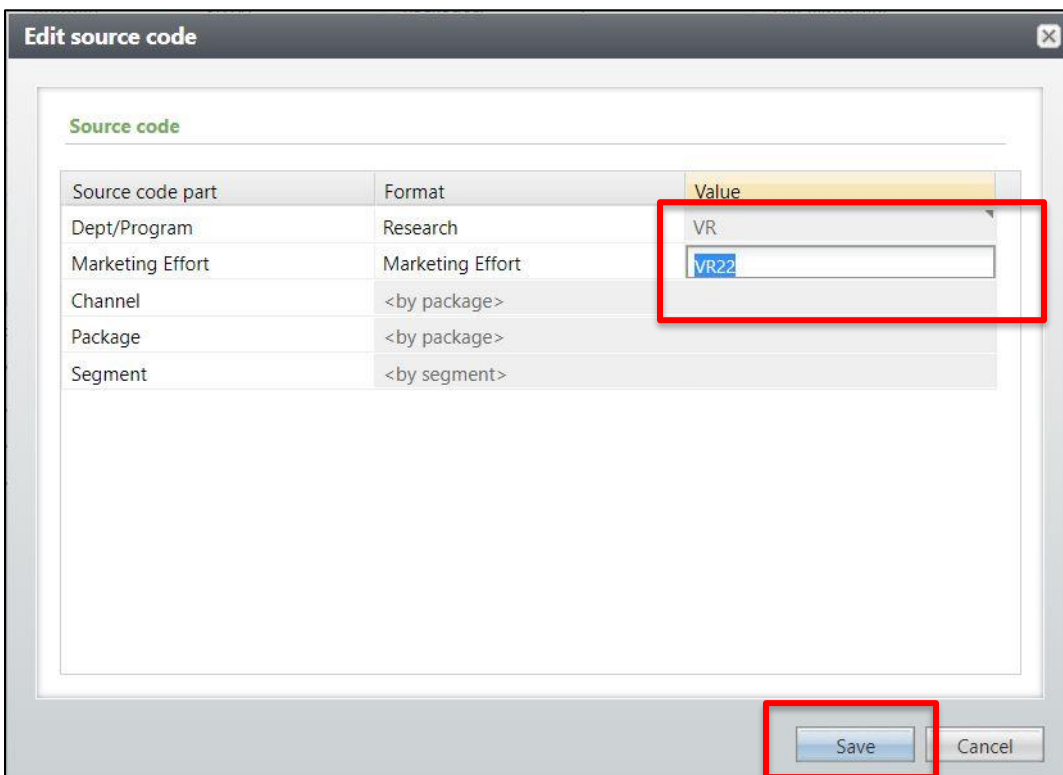
*On the Exclusions tab, choose which communications to use as exclusions for this effort*

Help | Save | Cancel

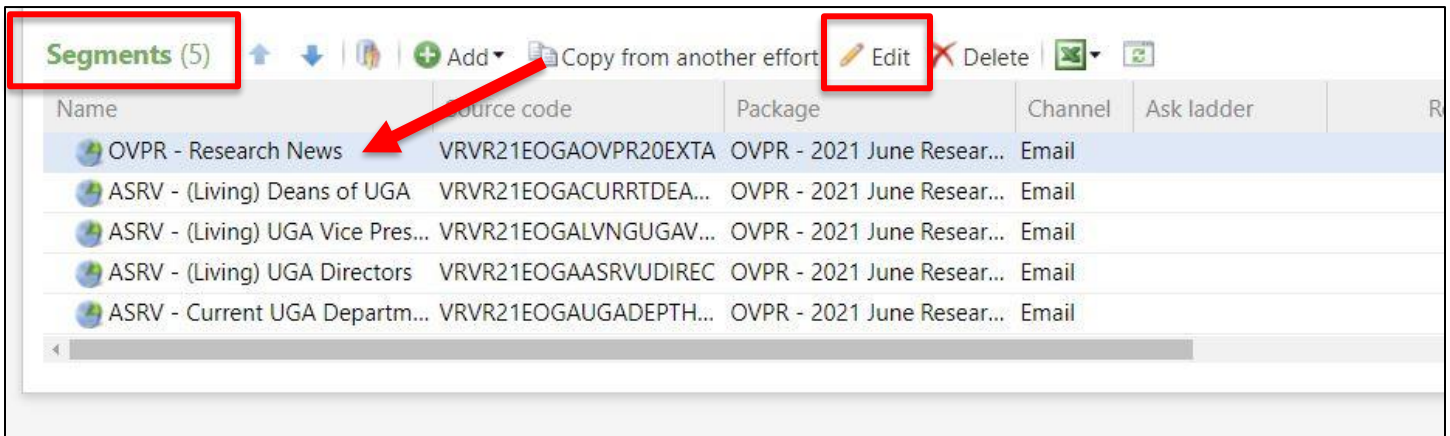
**Step 6.** If you copied a marketing effort from a previous fiscal year, you will need to update the source code. Select the **DME Dashboard** tab and click **Edit** next to Source code.



**Step 7.** Click into the value box next to marketing effort and adjust your **last two digits** to reflect the current fiscal year. Click **Save** when you are finished.

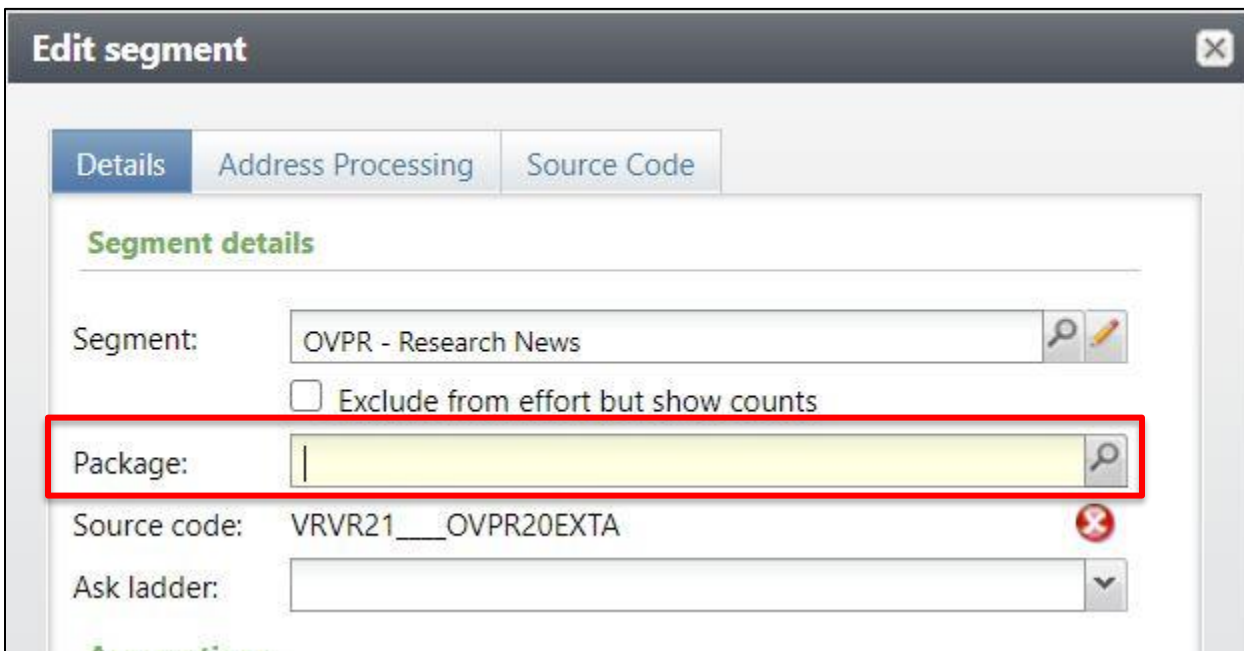


**Step 8.** Scroll to the bottom of your **DME Dashboard** tab and click the first segment in your list to highlight the row in blue, then click **Edit**.



Name	Source code	Package	Channel	Ask ladder
OVPR - Research News	VRVR21EOGAOVPR20EXTA	OVPR - 2021 June Resear...	Email	
ASRV - (Living) Deans of UGA	VRVR21EOGACURRTDEA...	OVPR - 2021 June Resear...	Email	
ASRV - (Living) UGA Vice Pres...	VRVR21EOGALVNGUGAV...	OVPR - 2021 June Resear...	Email	
ASRV - (Living) UGA Directors	VRVR21EOGAASRVUDIREC	OVPR - 2021 June Resear...	Email	
ASRV - Current UGA Departm...	VRVR21EOGAUGADEPTH...	OVPR - 2021 June Resear...	Email	



**Step 9.** Highlight and backspace the name of the current package listed, then click the **magnifying glass** to create a new one.




**Edit segment**


Details | Address Processing | Source Code

**Segment details**

Segment:   

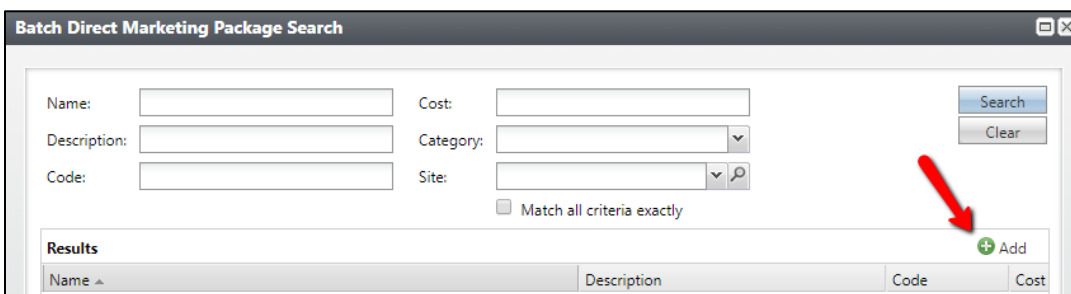
Exclude from effort but show counts

**Package:**  

Source code:  

Ask ladder:


**Step 10.** In the new window, click the **Add** button.



**Batch Direct Marketing Package Search**

Name:  Cost:


Description:  Category:

Code:  Site:  

Match all criteria exactly

**Results**

Name	Description	Code	Cost
------	-------------	------	------



**Step 11.** Fill out all the information for your new package. Click **Save**.

The 'Add email package' dialog box is shown with the following fields and values:

- Package details:**
  - Name: (empty text box)
  - Description: (empty text box)
  - Site: (dropdown menu)
  - Category: (dropdown menu)
  - Package code: (dropdown menu)
  - Channel code: (dropdown menu)
- Costs:**
  - Base cost: \$0.0000
  - Distribution: Per piece
  - Additional content cost: \$0.0000
  - Total per piece cost: \$0.0000
- Primary content:**
  - Message: (text box with search and edit icons)
  - Export definition: (text box with search and edit icons)

Buttons at the bottom: Help, Save, Cancel.

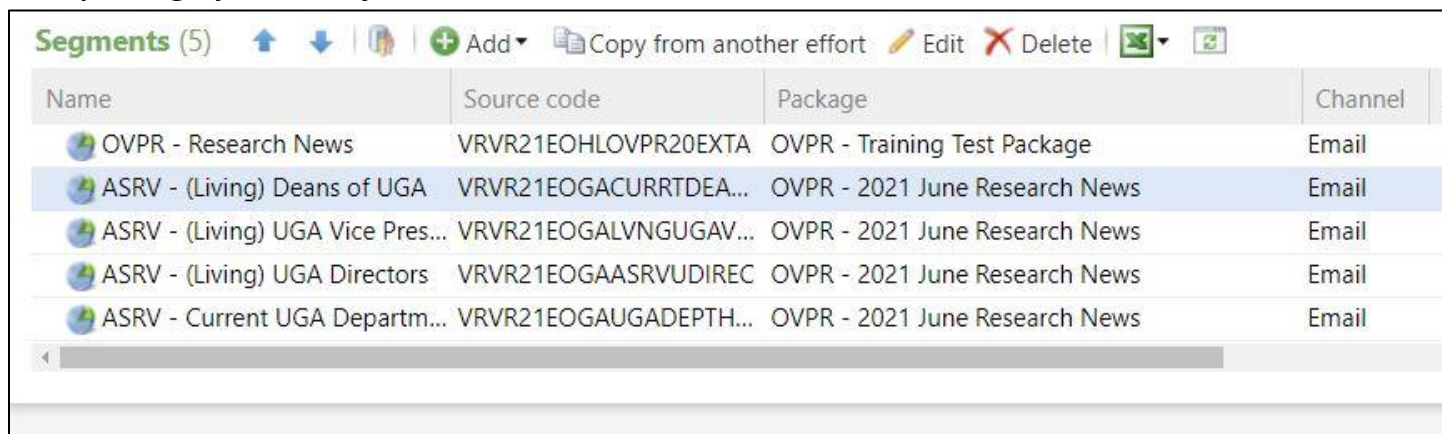
**Step 12.** The new package name will now show with your segment and the **Source Code** will have been updated. Click **Save**.

The 'Edit segment' dialog box is shown with the following fields and values:

- Segment details:**
  - Segment: OVPR - Research News
  - Exclude from effort but show counts
  - Package: OVPR - Training Test Package
  - Source code: VRVR21EOHLOVPR20EXTA
  - Ask ladder: (dropdown menu)
- Assumptions:**
  - Response rate: 5.00 %
  - Gift amount: \$0.00
  - Sample size: 100
  - Percent (selected)
  - nth  Random
  - Exclude remaining records from the marketing effort

Buttons at the bottom: Help, Save, Cancel.

**Step 13.** If you have multiple segments, edit each them to replace the old package with the new package you have just created.



The screenshot shows a table titled "Segments (5)" with the following columns: Name, Source code, Package, and Channel. The table contains five rows of data. The second row is highlighted in blue.

Name	Source code	Package	Channel
OVPR - Research News	VRVR21EOHLOVPR20EXTA	OVPR - Training Test Package	Email
ASRV - (Living) Deans of UGA	VRVR21EOGACURRTDEA...	OVPR - 2021 June Research News	Email
ASRV - (Living) UGA Vice Pres...	VRVR21EOGALVNGUGAV...	OVPR - 2021 June Research News	Email
ASRV - (Living) UGA Directors	VRVR21EOGAASRVUDIREC	OVPR - 2021 June Research News	Email
ASRV - Current UGA Departm...	VRVR21EOGAUGADEPTH...	OVPR - 2021 June Research News	Email

**Step 14.** Once you have updated the package for each segment in your marketing effort, you can continue with **Calculating**, **Exporting**, and **Activating** the effort.

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