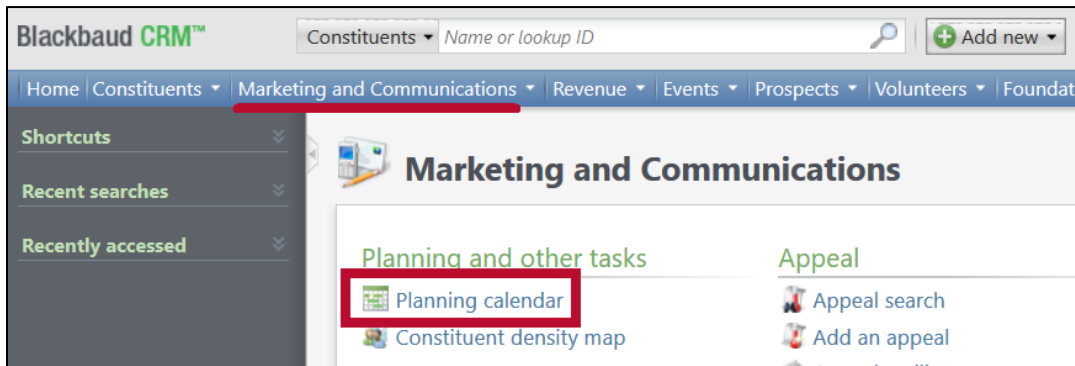
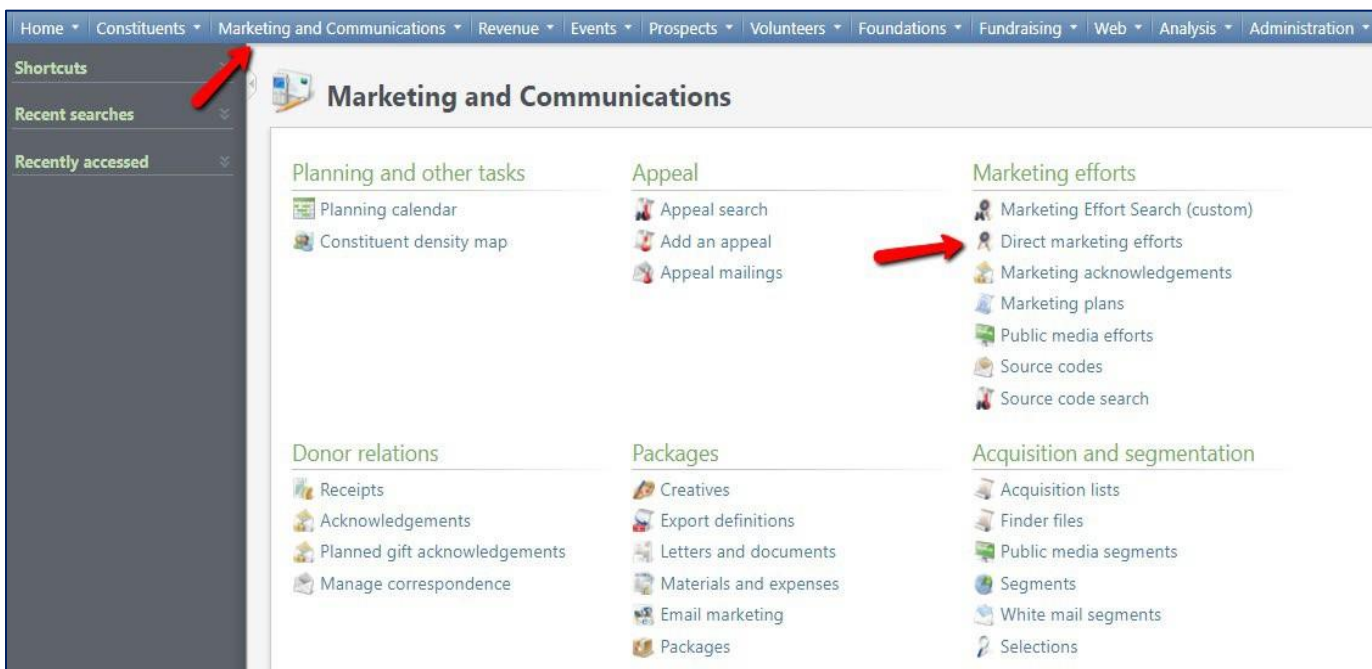


# How to Create a New Marketing Effort

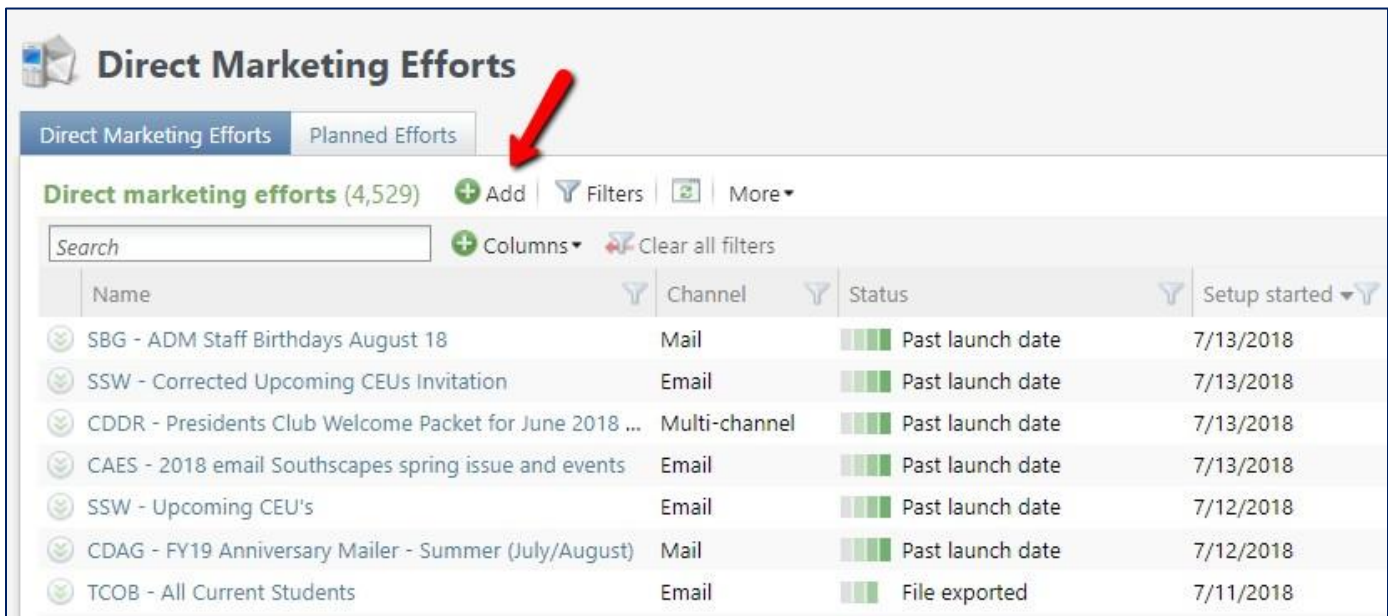
**Before you begin.** Check the [planning calendar](#). See what other teams are also sending on the day you want to send your marketing effort. If lots of efforts are competing for our constituents' attention, it may be smart to rethink your launch date!



**Step 1.** Navigate to the **Marketing and Communications** functional area and click **Direct Marketing Efforts**.



Step 2. Click the **Add** button.



**Direct Marketing Efforts**

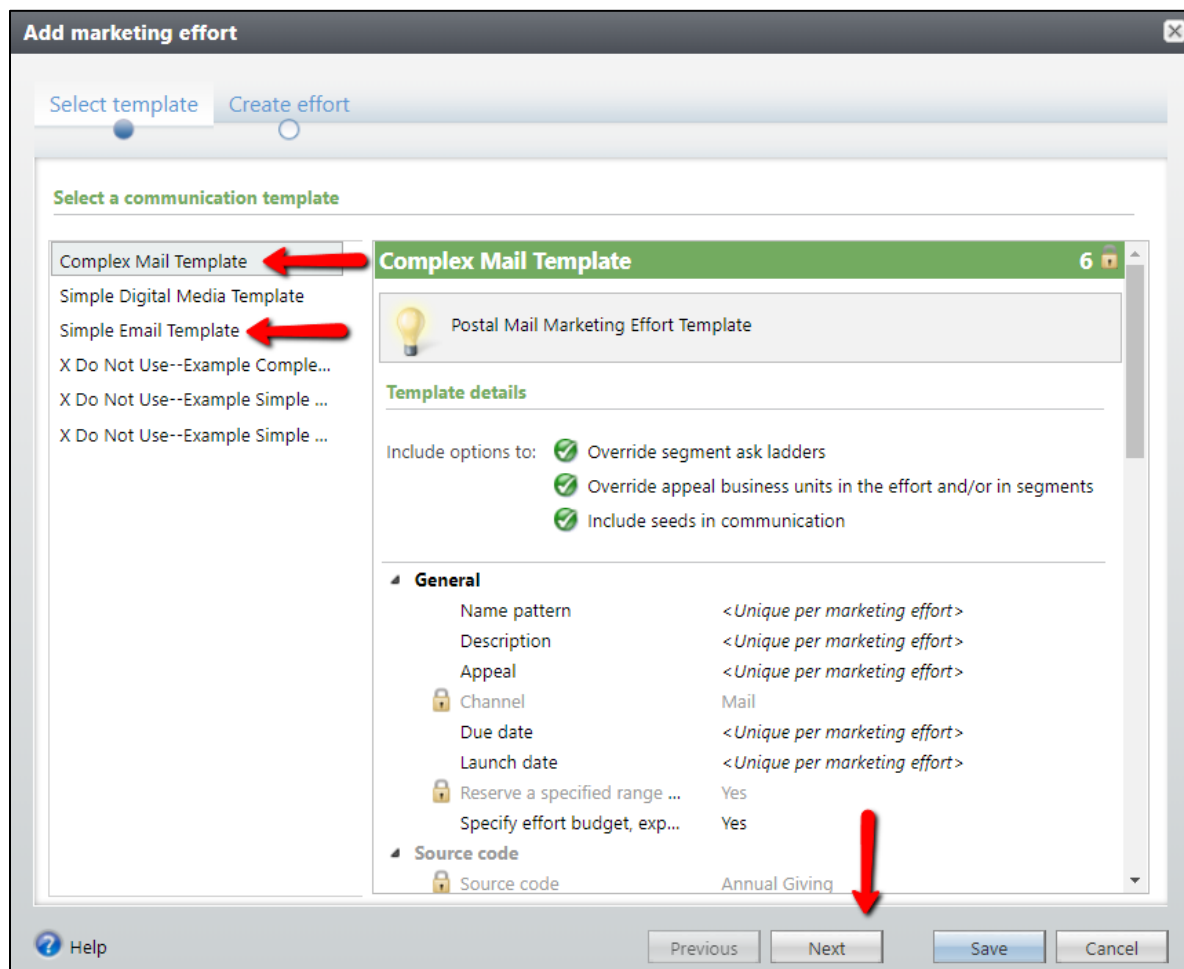
Direct Marketing Efforts | Planned Efforts

Direct marketing efforts (4,529) + Add | Filters | More

Search + Columns | Clear all filters

Name	Channel	Status	Setup started
SBG - ADM Staff Birthdays August 18	Mail	Past launch date	7/13/2018
SSW - Corrected Upcoming CEUs Invitation	Email	Past launch date	7/13/2018
CDDR - Presidents Club Welcome Packet for June 2018 ...	Multi-channel	Past launch date	7/13/2018
CAES - 2018 email Southscapes spring issue and events	Email	Past launch date	7/13/2018
SSW - Upcoming CEU's	Email	Past launch date	7/12/2018
CDAG - FY19 Anniversary Mailer - Summer (July/August)	Mail	Past launch date	7/12/2018
TCOB - All Current Students	Email	File exported	7/11/2018

Step 3. If you are creating a **postal mail marketing effort**, choose the **Complex Mail Template**. If you are creating an **email marketing effort**, choose the **Simple Email Template**. After you've chosen your template, click **Next**.



**Add marketing effort**

Select template | Create effort

Select a communication template

- Complex Mail Template
- Simple Digital Media Template
- Simple Email Template
- X Do Not Use--Example Comple...
- X Do Not Use--Example Simple ...
- X Do Not Use--Example Simple ...

**Complex Mail Template** 6

Postal Mail Marketing Effort Template

**Template details**

Include options to:

- Override segment ask ladders
- Override appeal business units in the effort and/or in segments
- Include seeds in communication

**General**

Name pattern	<Unique per marketing effort>
Description	<Unique per marketing effort>
Appeal	<Unique per marketing effort>
Channel	Mail
Due date	<Unique per marketing effort>
Launch date	<Unique per marketing effort>
Reserve a specified range ...	Yes
Specify effort budget, exp...	Yes

**Source code**

Source code	Annual Giving
-------------	---------------

Help | Previous | **Next** | Save | Cancel

**Step 4.** Name your marketing effort (beginning with your naming convention and current fiscal year) and write a brief **description** of your communication.

General information	
Template:	Complex Mail Template
Name:	<input type="text" value="CAES - FY22 Fall Solicitation Postcard"/>
Description:	<input type="text" value="Solicitation postcard mailed to all CAES donors and alumni"/>

**Step 5.** Search for the name of your **Appeal** beginning with your naming convention. You should select the appeal which ends with the current fiscal year.

*(Appeals are used to measure the effectiveness of marketing efforts within a given fiscal year.)*

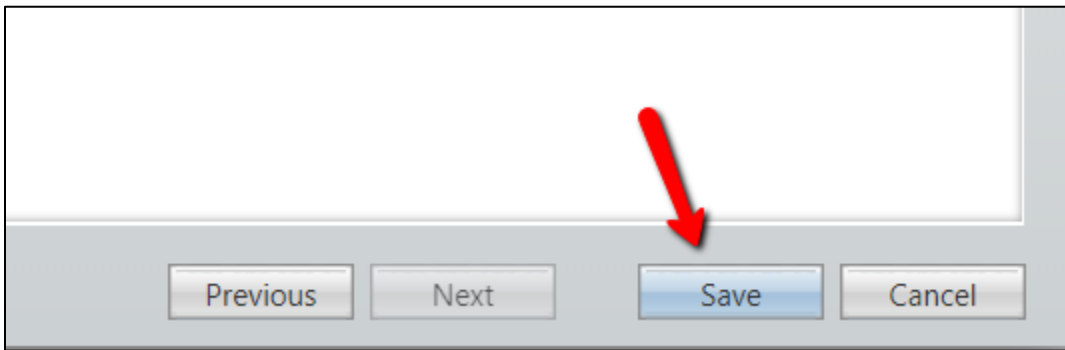
General information	
Template:	Complex Mail Template
Name:	<input type="text" value="CAES - FY21 Summer Solicitation Postcard"/>
Description:	<input type="text" value="Solicitation postcard mailed to all CAES donors and alumni"/>
Appeal:	<input type="text" value="CAES21"/>
Site:	<input type="text" value="Agricultural &amp; Environmental Sciences"/>

**Step 6.** Choose your school/unit from the **Site** drop-down menu and set a **due date** and a **launch date**.

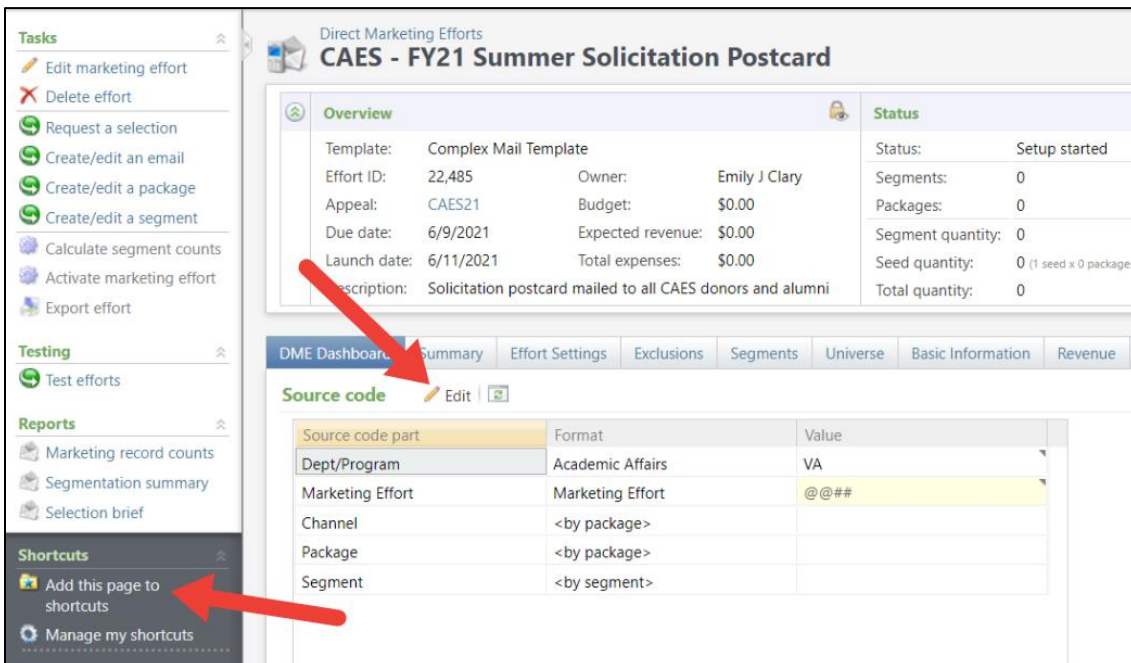
Site:	<input type="text" value="Agricultural &amp; Environmental Sciences"/>
Due date:	<input type="text" value="6/9/2021"/>
Launch date:	<input type="text" value="6/11/2021"/>

The **due date** is a personal goal you set for yourself to complete the marketing effort. The **launch date** is the day you plan on sending out your postal mailer or email. If you're not yet sure which day your communication will go out, you can set an estimated date and then correct it later.

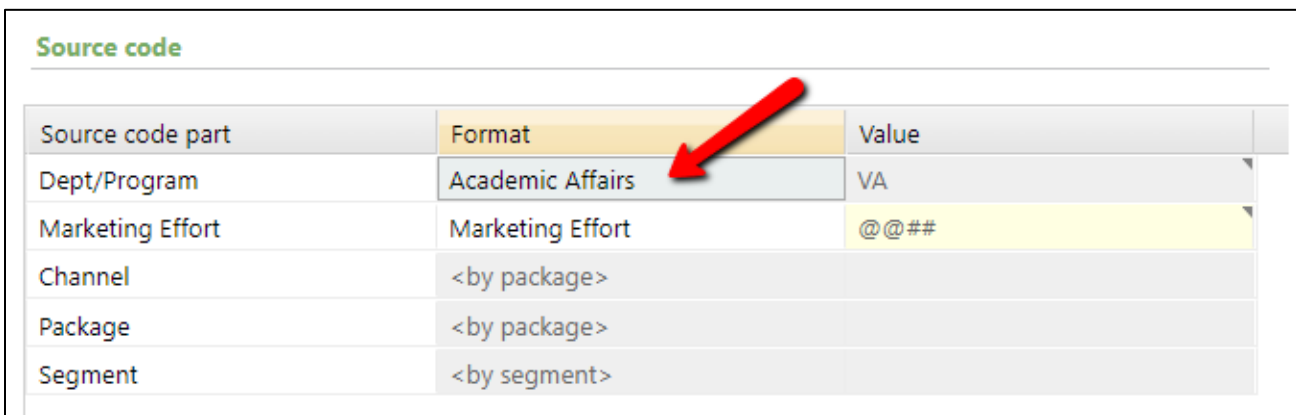
**Step 7.** Click **Save** when you are finished.



**Step 8.** In your newly created marketing effort, click **Add this page to shortcuts**. Then, in the **DME Dashboard** tab, click **Edit** next to the **Source code** header.

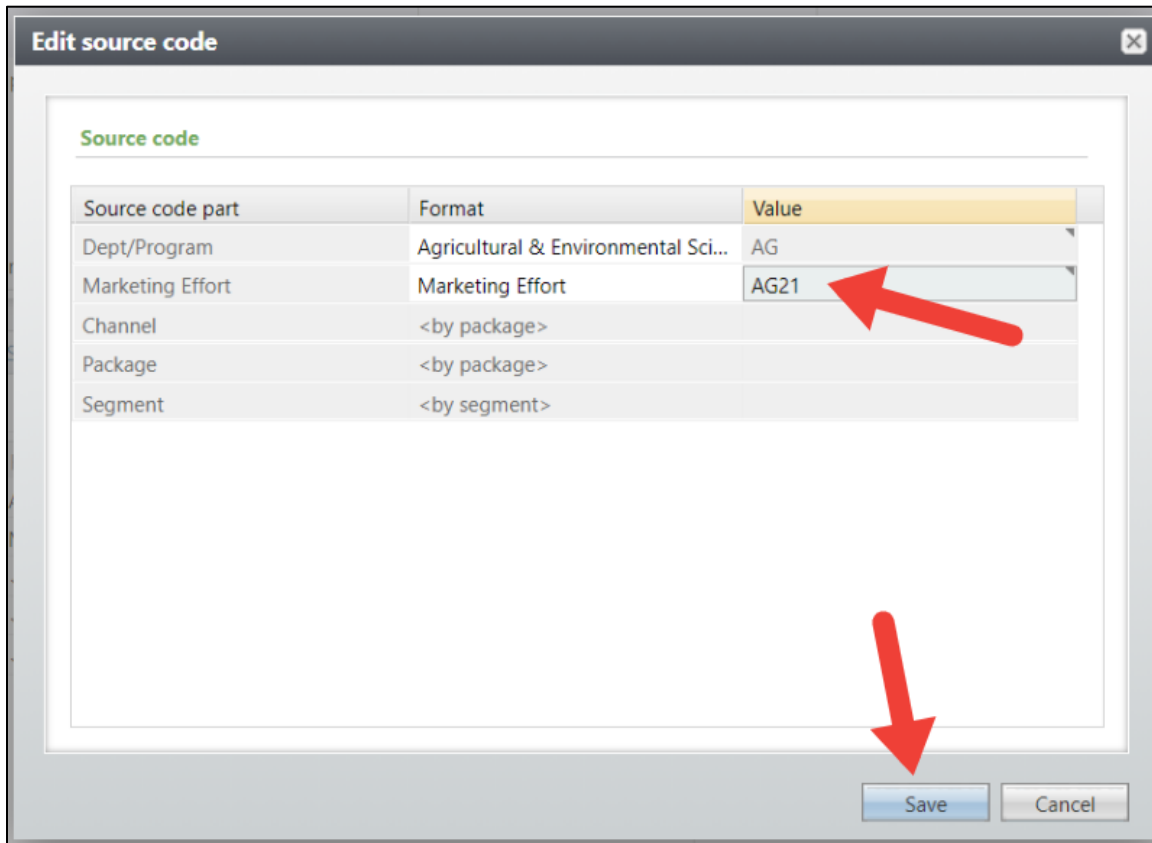


**Step 9.** Under the **Format** column header, click into the box that says *Academic Affairs* and select your school/college/unit from the drop-down menu. The Value in the right column will automatically update to reflect your unit.



**Step 10.** Click into the value field highlighted in yellow. Copy your **2-letter value code** from the row above and **the current fiscal year**. (For example, if I was from the business school and it was FY21, I would enter BU21. If I was from the law school and it was FY22, I would enter LW22.)

Click **Save** when you are finished.



The screenshot shows a dialog box titled "Edit source code" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Source code" containing a table with the following data:

Source code part	Format	Value
Dept/Program	Agricultural & Environmental Sci...	AG
Marketing Effort	Marketing Effort	AG21
Channel	<by package>	
Package	<by package>	
Segment	<by segment>	

At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

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If you have any questions regarding 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 6/4/2021*