

# How to Edit Address Processing & Name Formats

**Step 1.** Within your marketing effort, click on the **DME Dashboard** tab and scroll down to find the **Address Processing & Name Format Options** section. Then click **Edit**.

The screenshot shows the 'Direct Marketing Efforts' interface for 'CAES - 2019 March Newsletter'. It features a navigation menu at the top with categories like 'Marketing and Communications', 'Revenue', 'Events', etc. The main content area is divided into three columns: 'Overview', 'Status', and 'History'. The 'Overview' column lists details such as 'Template: Simple Email Template', 'Effort ID: 14,028', 'Owner: Leslie K West', 'Appeal: CAES19', 'Budget: \$0.00', 'Due date', 'Launch date: 3/8/2019', and 'Description'. The 'Status' column shows 'Status: File exported', 'Segments: 1', 'Packages: 1', 'Segment quantity: 50', 'Seed quantity: 1 (1 seed x 1 package)', and 'Total quantity: 51'. The 'History' column lists 'Setup started: 3/6/2019', 'Counts generated: 3/6/2019 ✓', 'File exported: 3/6/2019 ✓', 'Activated: 3/7/2019 ✓', and 'Refreshed: --'. At the bottom, a navigation bar includes tabs for 'Summary', 'Segments', 'Universe', 'Exclusions', 'Effort Settings', 'Basic Information', 'Revenue', 'Revenue Pivot Table', and 'DME Dashboard'. A red arrow points to the 'DME Dashboard' tab.

This screenshot shows the 'Effort level address processing / name formats' section. It includes an 'Edit' button and a '3' icon. Below the title, it states: 'When performing calculations and exporting marketing effort data:'. A green checkmark icon is followed by the instruction: 'Use the following address processing and name formatting options:'. The configuration options are listed as follows:  
Address processing option: General User Preference  
Consider seasonal addresses as of: Today  
Name format option: ASRV - Formal Email Salutations

**Important Note:** Choosing the correct options depends heavily on what type of communication you are sending. Read the next lines carefully to access the correct instructions for your situation.

If you are sending an EMAIL DME with no salutation, **follow the instructions in GREEN.**

If you are sending an EMAIL DME with an informal salutation, **follow the instructions in TEAL.**

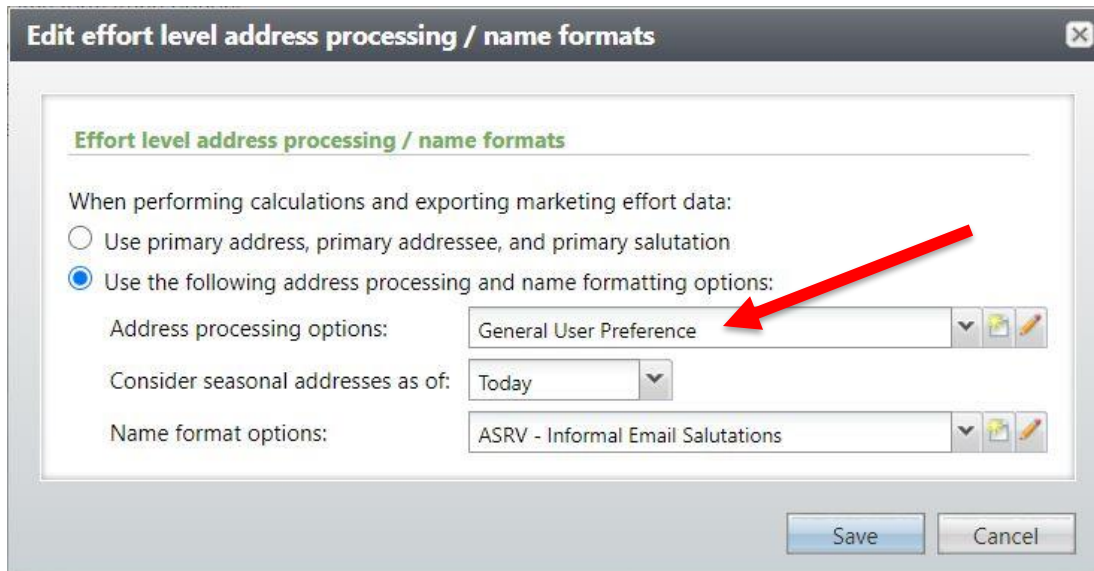
If you are sending an EMAIL DME with a formal salutation, **follow the instructions in PURPLE.**

If you are sending a MAIL DME without forcing in spouses, **follow the instructions in RED.**

If you are sending a MAIL DME and wish to force in spouses, **follow the instructions in navy.**

## EMAIL with NO Salutation

**Step 2.** Choose **General User Preference** as the Address Processing Option.







**Edit effort level address processing / name formats**




**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

- Use primary address, primary addressee, and primary salutation
- Use the following address processing and name formatting options:

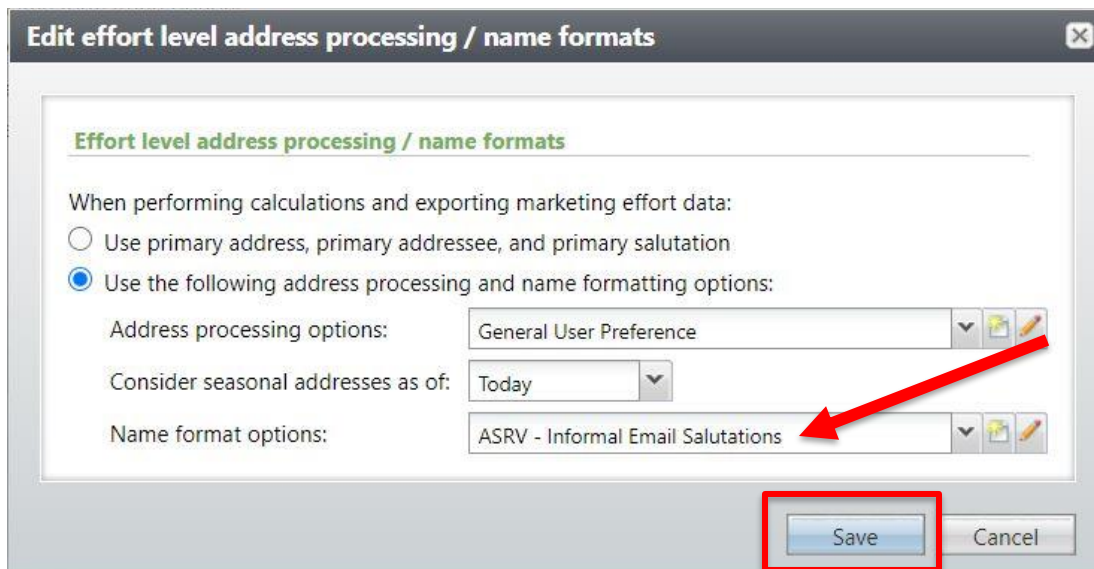
Address processing options:    

Consider seasonal addresses as of:  

Name format options:    

**Step 3.** Choose **ASRV – Informal Email Salutations** as the Name Format Option.

Click **Save** when you are finished.







**Edit effort level address processing / name formats**




**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

- Use primary address, primary addressee, and primary salutation
- Use the following address processing and name formatting options:

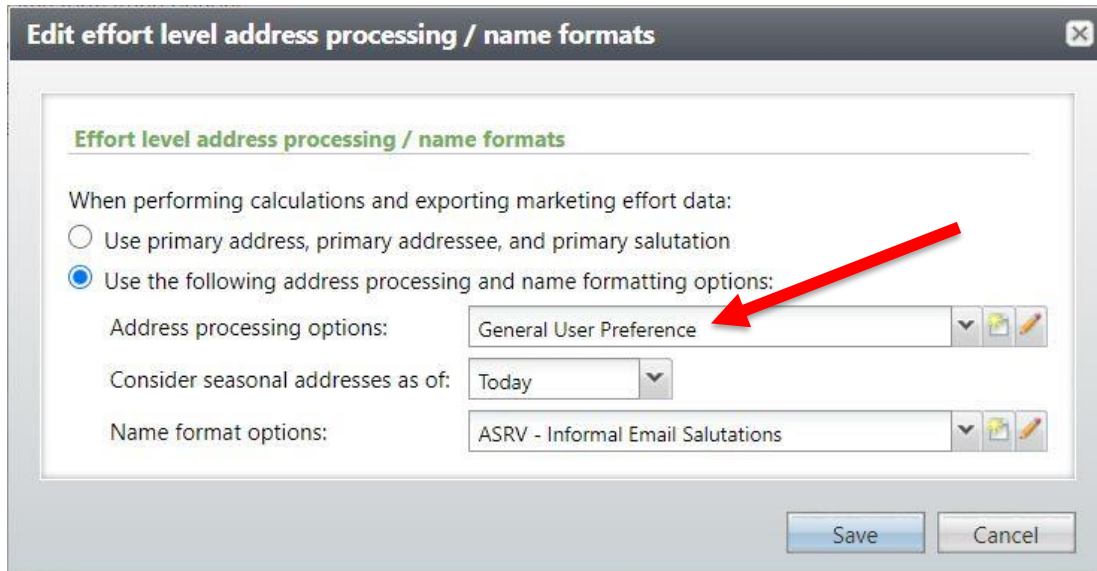
Address processing options:    

Consider seasonal addresses as of:  

Name format options:    

## EMAIL with INFORMAL Salutation

**Step 2.** Choose **General User Preference** as the Address Processing Option.



**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

- Use primary address, primary addressee, and primary salutation
- Use the following address processing and name formatting options:

Address processing options: General User Preference

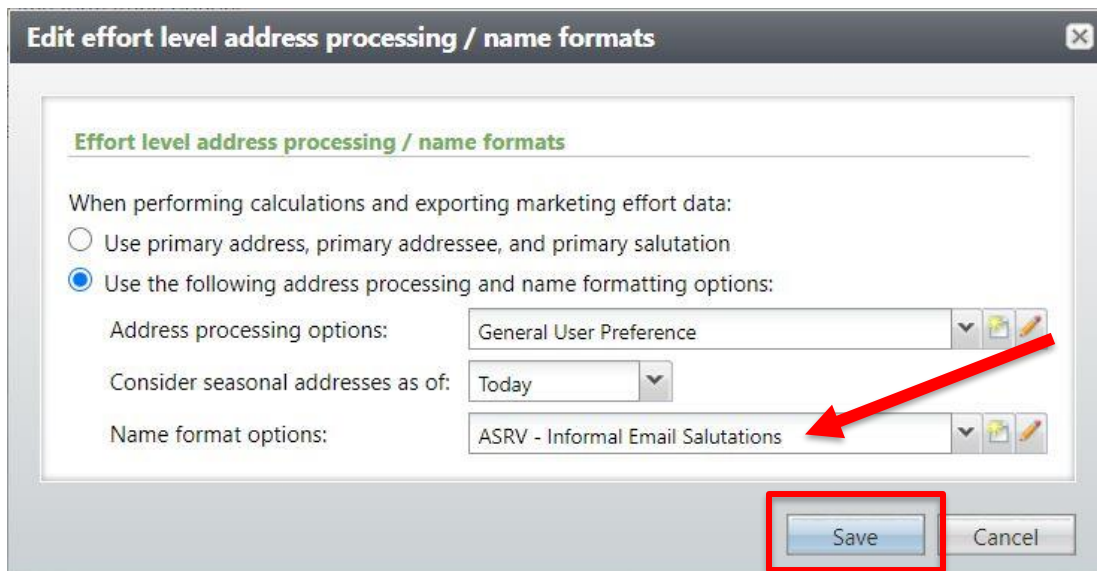
Consider seasonal addresses as of: Today

Name format options: ASRV - Informal Email Salutations

Save Cancel

**Step 3.** Choose **ASRV – Informal Email Salutations** as the Name Format Option.

Click **Save** when you are finished.



**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

- Use primary address, primary addressee, and primary salutation
- Use the following address processing and name formatting options:

Address processing options: General User Preference

Consider seasonal addresses as of: Today

Name format options: ASRV - Informal Email Salutations

Save Cancel

## EMAIL with FORMAL Salutation

**Step 2.** Choose **General User Preference** as the Address Processing Option.

**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

Use primary address, primary addressee, and primary salutation

Use the following address processing and name formatting options:

Address processing options:

Consider seasonal addresses as of:

Name format options:

**Step 3.** Choose **ASRV – Formal Email Salutations** as the Name Format Option.

Click **Save** when you are finished.

**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

Use primary address, primary addressee, and primary salutation

Use the following address processing and name formatting options:

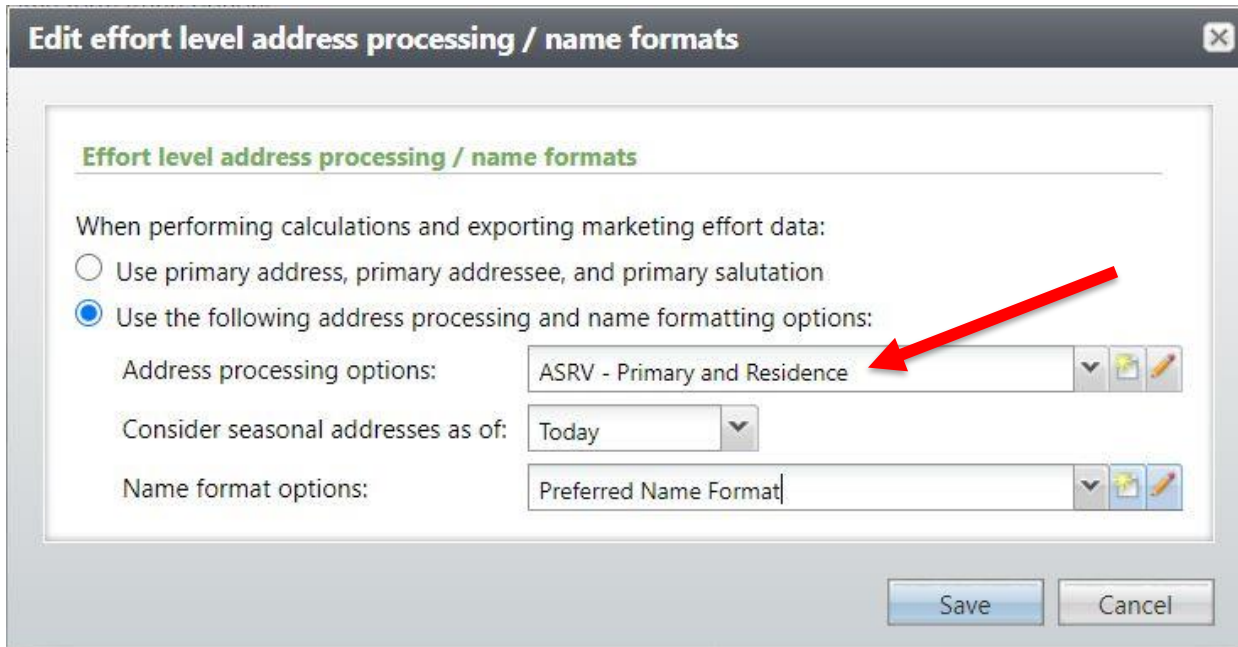
Address processing options:

Consider seasonal addresses as of:

Name format options:

## MAIL that does NOT Force in Spouses

**Step 2.** Choose **ASRV – Primary and Residence** for the Address Processing Option.



**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

Use primary address, primary addressee, and primary salutation

Use the following address processing and name formatting options:

Address processing options: ASRV - Primary and Residence

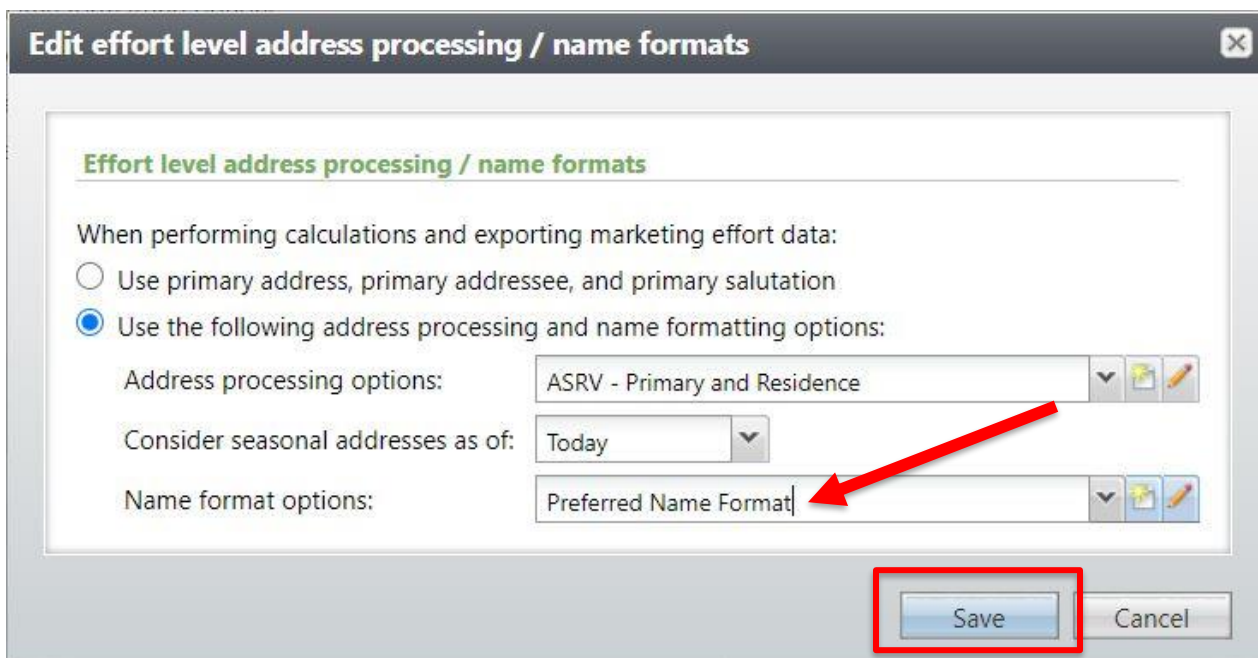
Consider seasonal addresses as of: Today

Name format options: Preferred Name Format

Save Cancel

**Step 3.** Choose **Preferred Name Format** for the Name Format Option.

Click **Save** when you are finished.



**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

Use primary address, primary addressee, and primary salutation

Use the following address processing and name formatting options:

Address processing options: ASRV - Primary and Residence

Consider seasonal addresses as of: Today

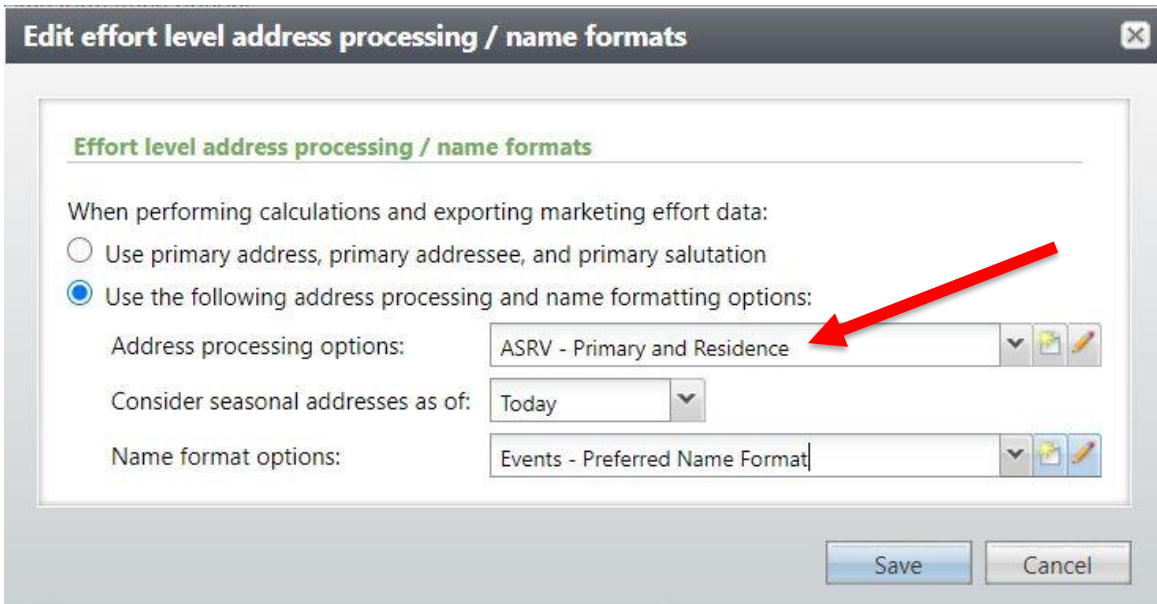
Name format options: Preferred Name Format

Save Cancel



# MAIL that DOES Force in Spouses

**Step 2.** Choose **ASRV – Primary and Residence** for the Address Processing Option.



**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

- Use primary address, primary addressee, and primary salutation
- Use the following address processing and name formatting options:

Address processing options: ASRV - Primary and Residence

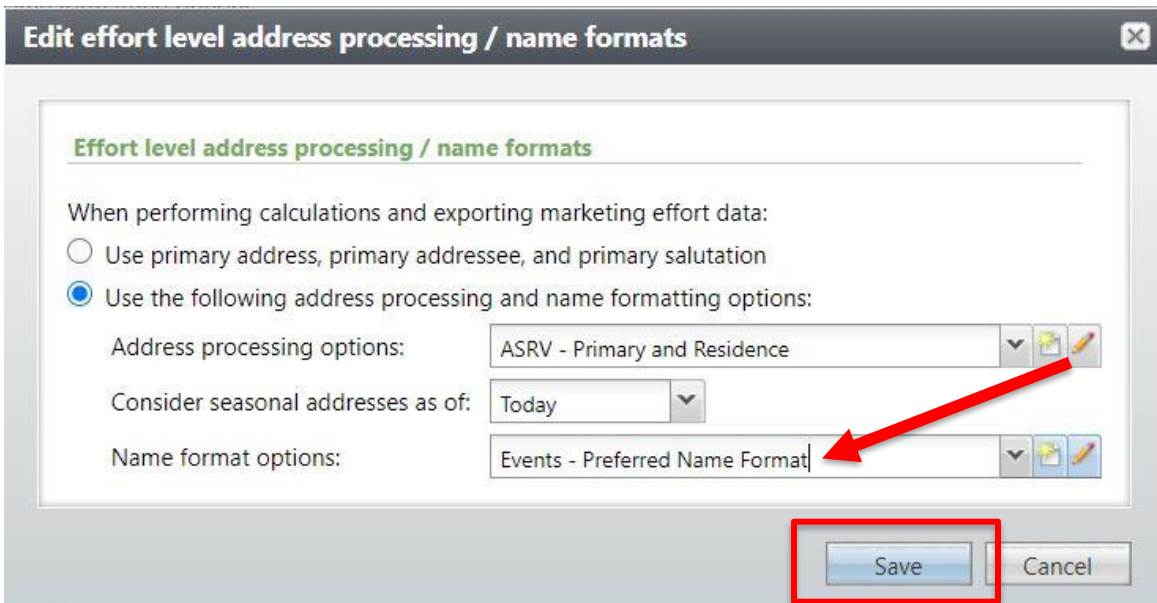
Consider seasonal addresses as of: Today

Name format options: Events - Preferred Name Format

Save Cancel

**Step 3.** Choose **Events – Preferred Name Format** for the Name Format Option.

Click **Save** when you are finished.



**Edit effort level address processing / name formats**

**Effort level address processing / name formats**

When performing calculations and exporting marketing effort data:

- Use primary address, primary addressee, and primary salutation
- Use the following address processing and name formatting options:

Address processing options: ASRV - Primary and Residence

Consider seasonal addresses as of: Today

Name format options: Events - Preferred Name Format

Save Cancel

If you have any questions about this instructional guide, or need additional assistance, please contact the Client Services team at [askit@uga.edu](mailto:askit@uga.edu).