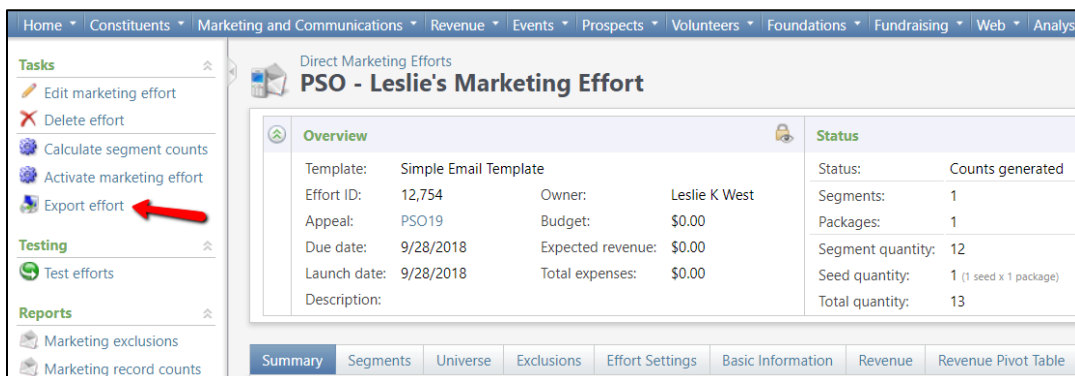


# How to Export a Postal Mail Marketing Effort

**Step 1.** Click **Export Effort** in the top-left corner of your marketing effort.



Home | Constituents | Marketing and Communications | Revenue | Events | Prospects | Volunteers | Foundations | Fundraising | Web | Analysis

**Tasks**

- Edit marketing effort
- Delete effort
- Calculate segment counts
- Activate marketing effort
- Export effort** (indicated by a red arrow)

**Testing**

- Test efforts

**Reports**

- Marketing exclusions
- Marketing record counts

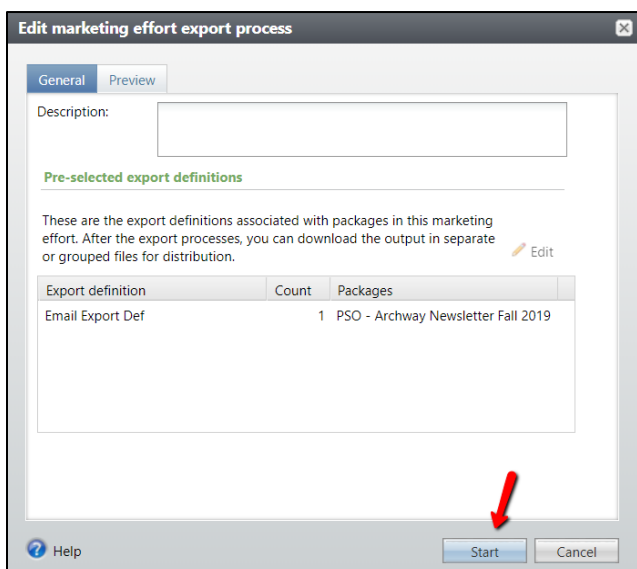
Direct Marketing Efforts  
**PSO - Leslie's Marketing Effort**

**Overview**

|              |                       |                   |               |                   |                        |
|--------------|-----------------------|-------------------|---------------|-------------------|------------------------|
| Template:    | Simple Email Template |                   |               | Status:           | Counts generated       |
| Effort ID:   | 12,754                | Owner:            | Leslie K West | Segments:         | 1                      |
| Appeal:      | PSO19                 | Budget:           | \$0.00        | Packages:         | 1                      |
| Due date:    | 9/28/2018             | Expected revenue: | \$0.00        | Segment quantity: | 12                     |
| Launch date: | 9/28/2018             | Total expenses:   | \$0.00        | Seed quantity:    | 1 (1 seed x 1 package) |
| Description: |                       |                   |               | Total quantity:   | 13                     |

Summary | Segments | Universe | Exclusions | Effort Settings | Basic Information | Revenue | Revenue Pivot Table

**Step 2.** When the new pop-up window appears, click **Start**.



**Edit marketing effort export process**

General | Preview

Description:

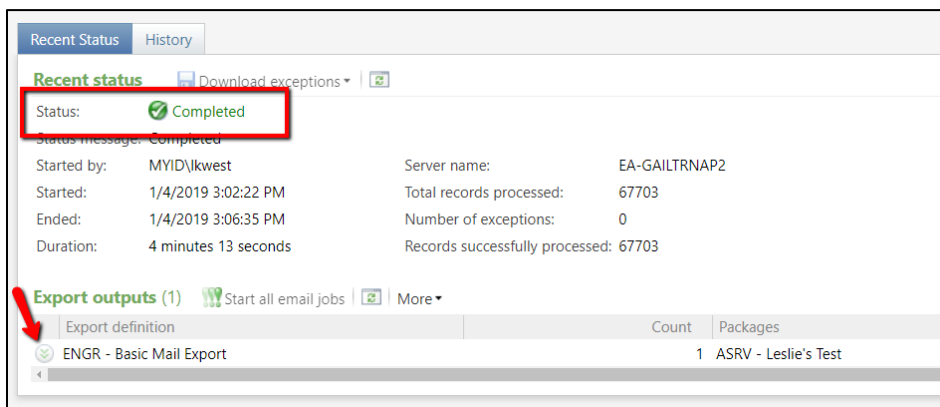
**Pre-selected export definitions**

These are the export definitions associated with packages in this marketing effort. After the export processes, you can download the output in separate or grouped files for distribution. Edit

| Export definition | Count | Packages                           |
|-------------------|-------|------------------------------------|
| Email Export Def  | 1     | PSO - Archway Newsletter Fall 2019 |

Help | Start | Cancel

**Step 3.** When the export process is complete, click the drop-down arrow next to your **Export output**. Then click **Download Output** and choose **Download to XLSX**.



Recent Status | History

**Recent status** | Download exceptions

Status: **Completed**

Status message: Completed

Started by: MYID\lkwest | Server name: EA-GAILTRNAP2

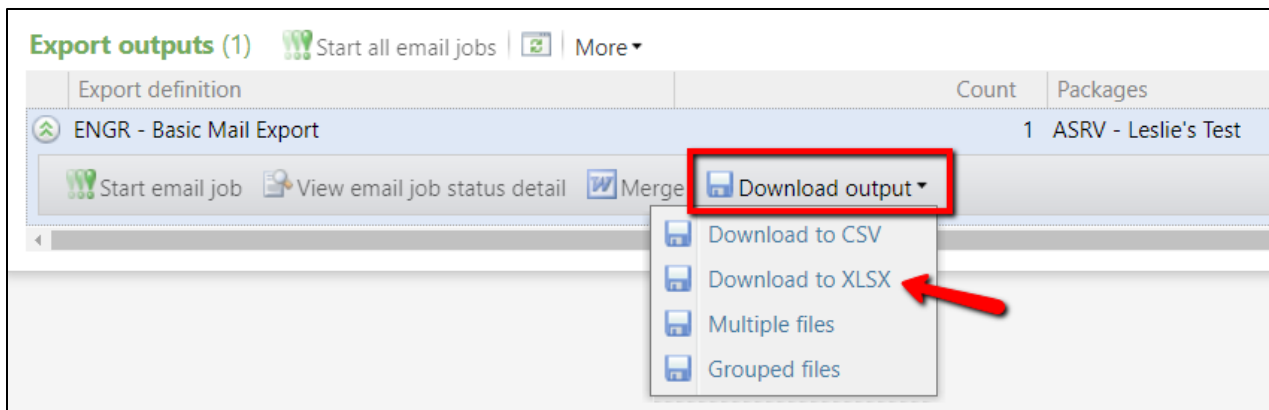
Started: 1/4/2019 3:02:22 PM | Total records processed: 67703

Ended: 1/4/2019 3:06:35 PM | Number of exceptions: 0

Duration: 4 minutes 13 seconds | Records successfully processed: 67703

**Export outputs (1)** | Start all email jobs | More

| Export definition        | Count | Packages             |
|--------------------------|-------|----------------------|
| ENGR - Basic Mail Export | 1     | ASRV - Leslie's Test |



Your Excel spreadsheet file should automatically begin to download.

**Step 4.** Before sending your file on to the printer, you should always:

- Carefully review the file for any missing or incorrect data (contact information, name formats, etc)
- Remove extra information from the file (graduation years, giving info, alternate contact information)
- Ensure your printer/vendor has a Non-Disclosure Agreement on file on their constituent record in GAIL. If there isn't one, you can [get one signed here](#).

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

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