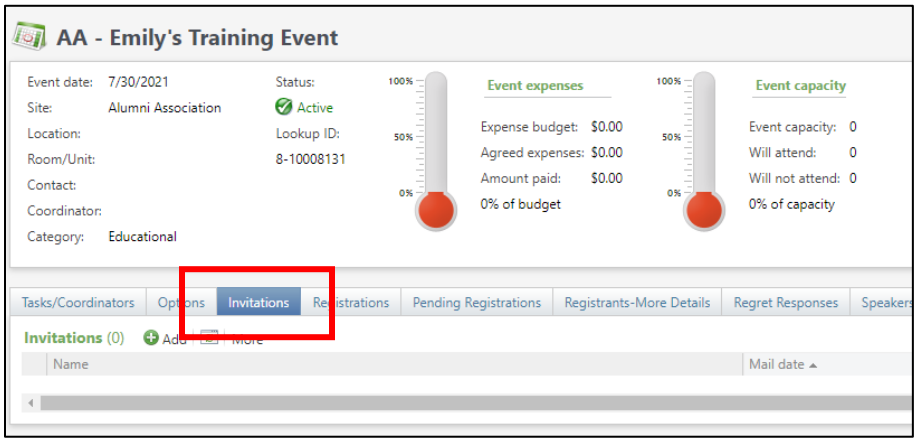
How to Send a Mail Invitation

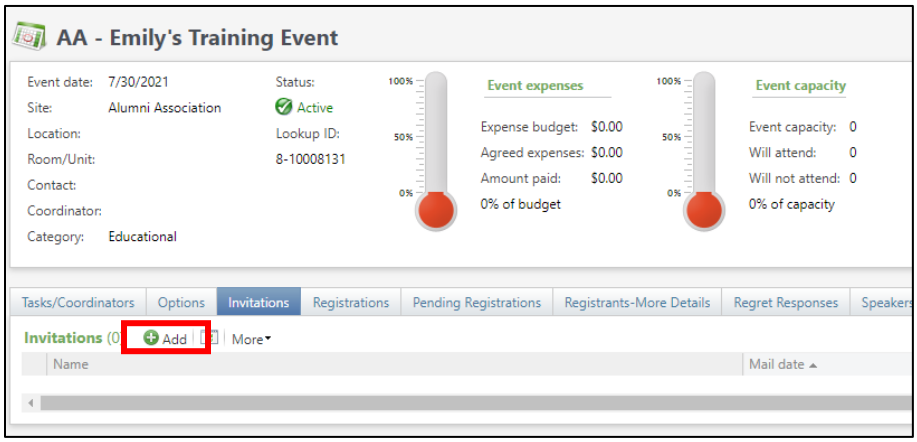
You must already have your event in GAIL before beginning this guide. You must also know which selection you will be sending the mailer to. If you need help with those processes, refer to these guides:

- How to Create a Single-Level Event
- How to Submit an AskIT Ticket

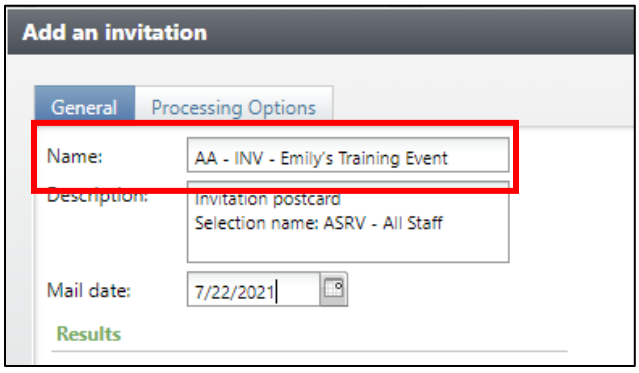
Step 1. In your event, open the **Invitations** tab.



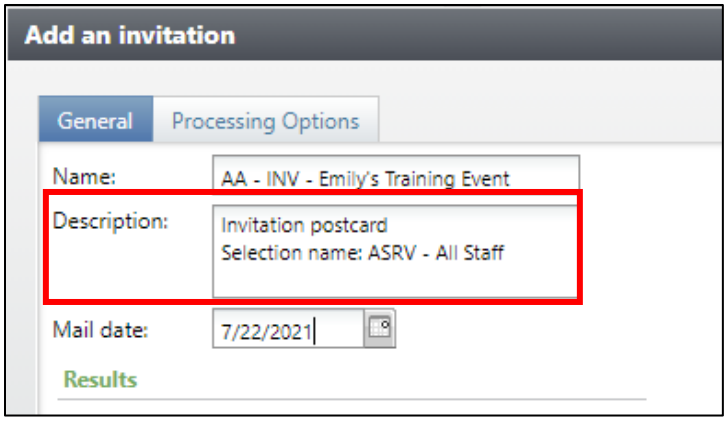
Step 2. Click **Add**.



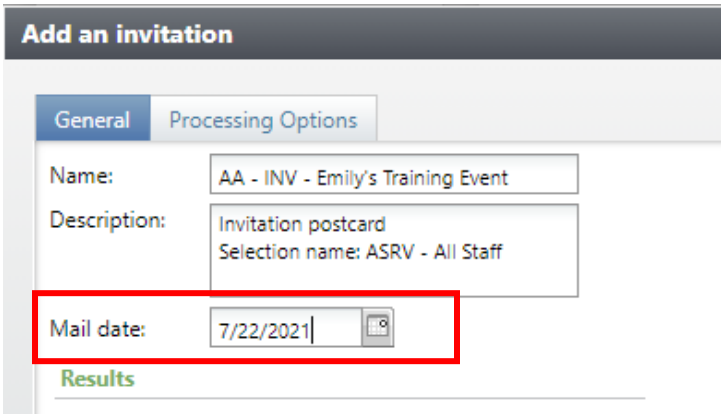
Step 3. Name your invitation beginning with your unit naming convention followed by the most appropriate event naming convention: SAVE, INV, AFTER, REM



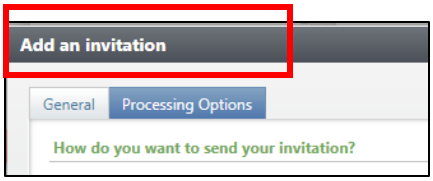
Step 4. Describe your communication. Put the name of your selection here.



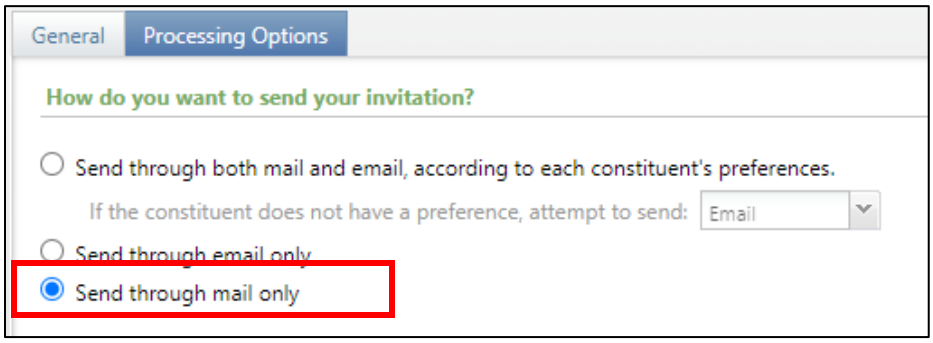
Step 5. Set the mail date. This is the date you plan to send your postcard.



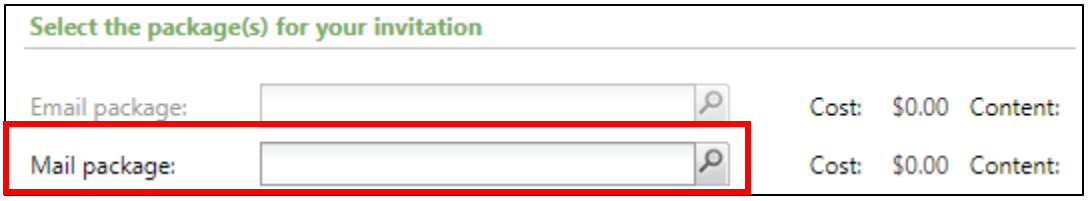
Step 6. Click the **Processing Options** tab.



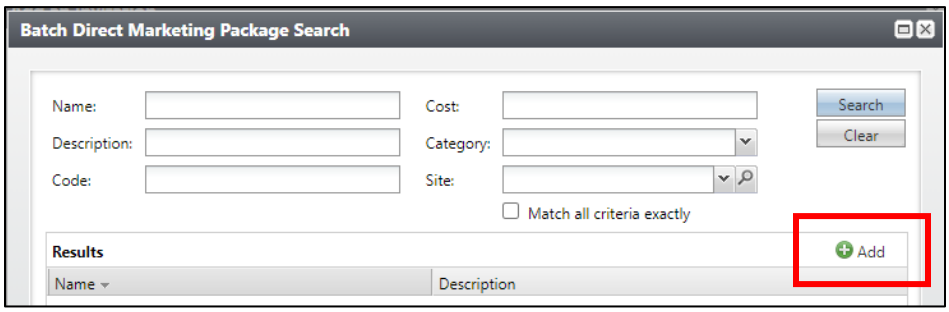
Step 7. Choose **Send through Mail Only**



Step 8. Click the magnifying glass on the text box for **Mail Package**.

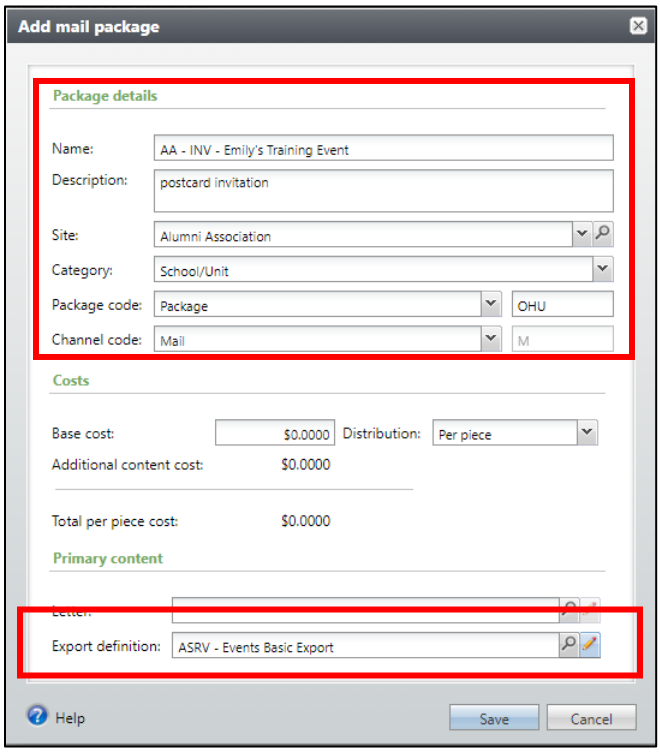


Step 9. On the Package Search window, click **Add**.

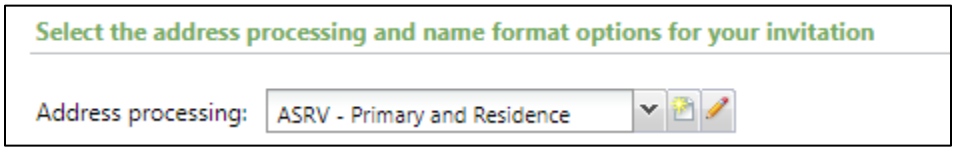


Step 10. Now complete the package information. Once you save, the name of the package will populate into the **Email Package** field and you'll be able to see your email name to the right of that text box.

- Name your package the exact same thing as your invitation.
- Give the package a description.
- Choose your Site.
- For Category, choose School/Unit
- Select Package from the Package Code dropdown menu. A code will be randomly generated for you.
- Choose Mail from the Channel Code dropdown menu. A code will be generated for you.
- In the Export Definition field, you may choose a unit specific export definition if you have one. If you don't, use ASRV – Events Basic Export.
- Click **Save**.

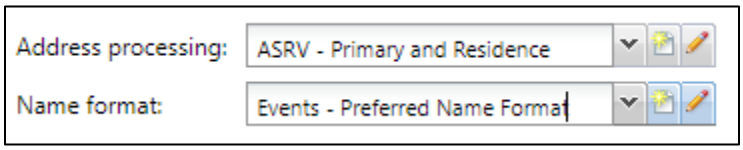


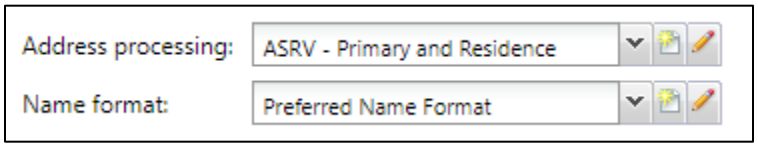
Step 11. Change the Address Processing Option to **ASRV – Primary and Residence**. If you need campus or business addresses, reach out to Client Services and we'll help you choose the right settings.



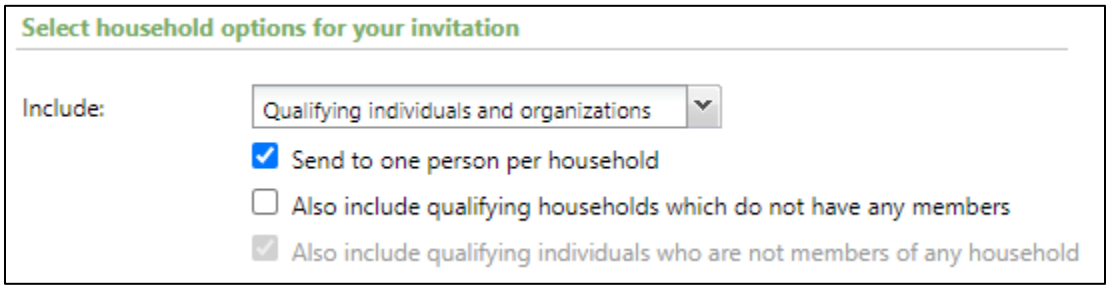
Step 12. Change the Name Format Option to one of the following:

- **Events – Preferred Name Format** (to force the spouse's name onto the envelope addressee line)
- **Preferred Name Format** (to only include constituents who meet the selection criteria)



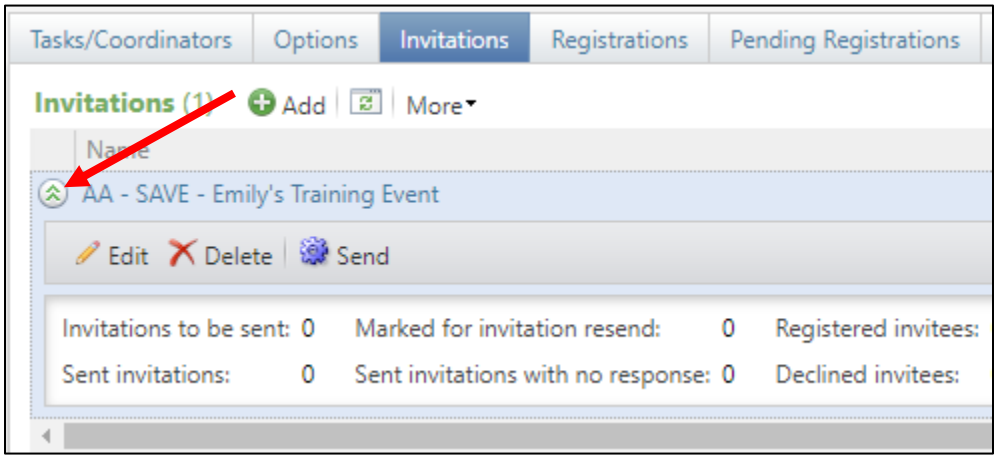


Step 13. The default Household Options are already set for a mailed invitation, you don't need to edit them.

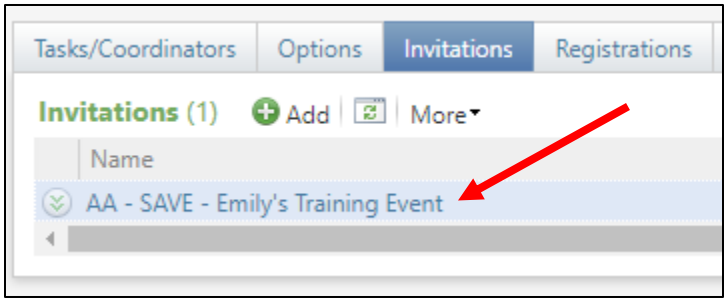


Step 14. Click **Save**

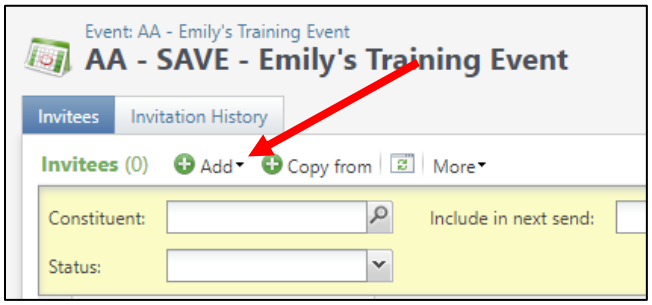
Note: If you need to edit any of those options before sending, click the dropdown arrow next to the name of your invitation and click Edit.



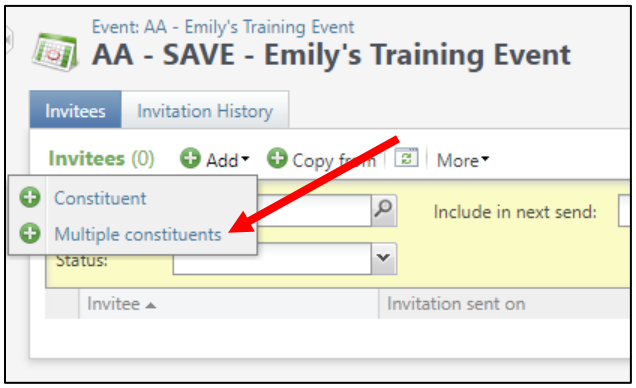
Step 15. To add invitees to your invitation, click on the name.



Step 16. Click **Add**. To add a selection of constituents, continue to **Step 17**. To add individual constituents, skip ahead to **Step 20**.

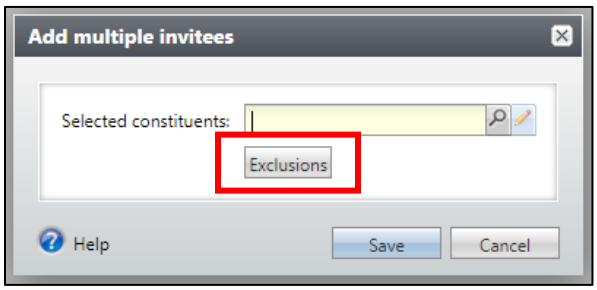


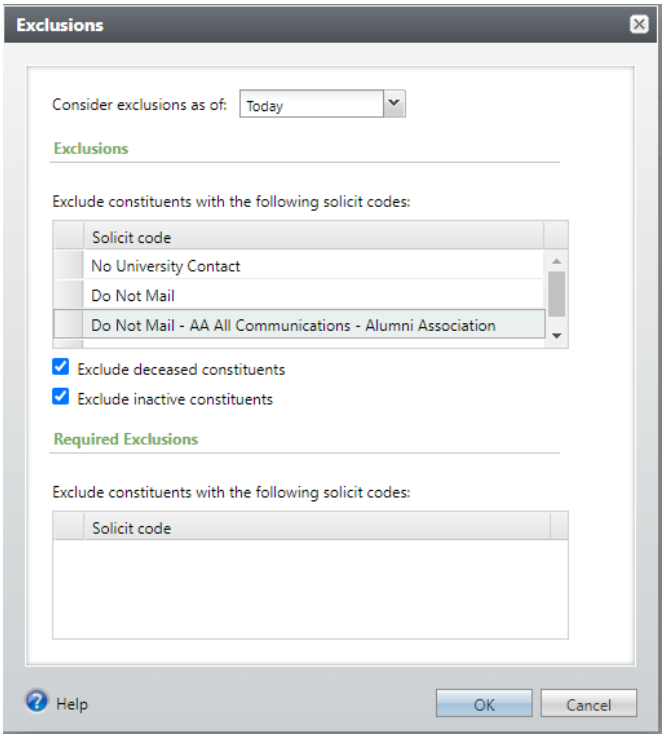
Step 17. To add a selection of invitees, choose **Multiple Constituents** from the dropdown.



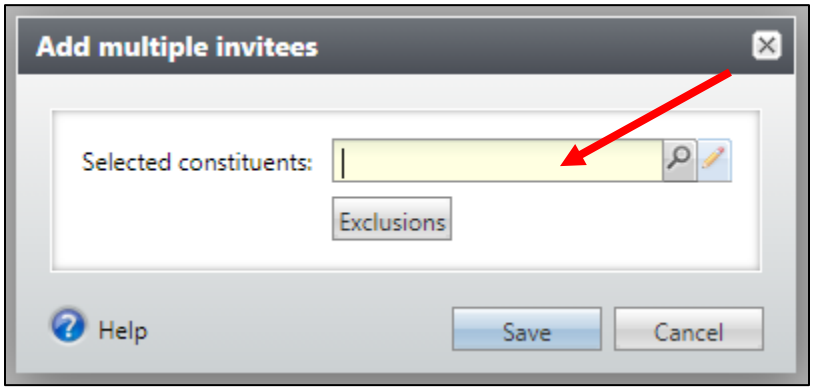
Step 18. Click the **Exclusions** button to edit your solicit codes. You will always need to edit these to reflect the settings of your invitation. **Do Not Mail** and **No University Contact** are required for all email invitations. You will also need to add the **Do Not Mail code that is specific to your unit**.

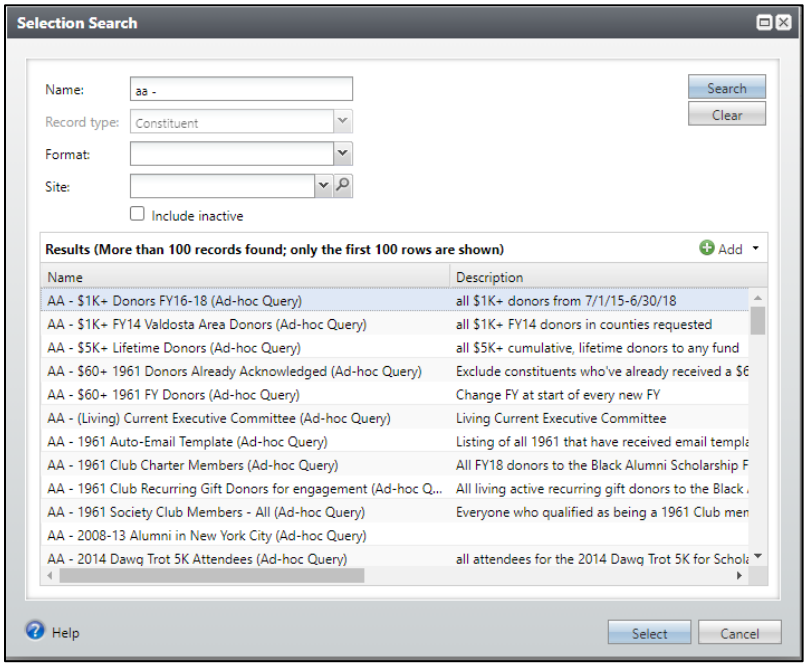
If your postcard is a solicitation, you will need **Do Not Solicit** as well as the **Do Not Solicit code that is specific to your unit.**



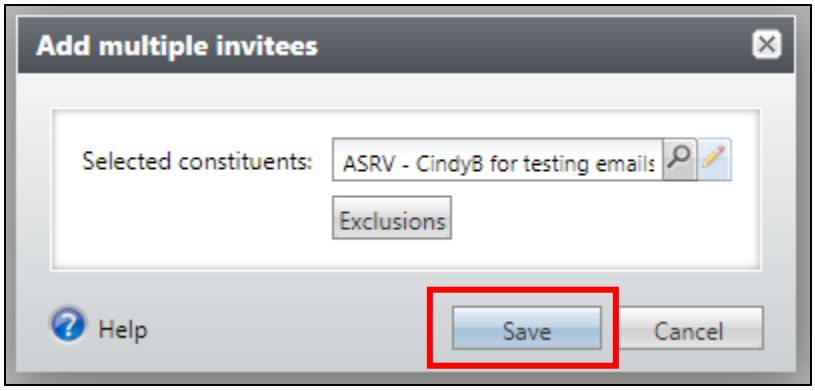


Step 19. Click **OK**. Now search for the name of your selection in the yellow text box and select it from the search results.



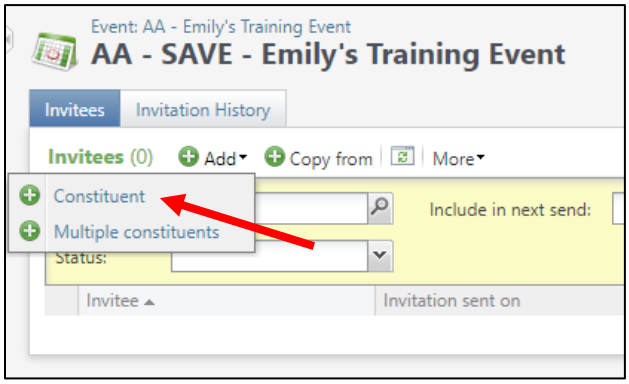


The selection name will populate into the Selected Constituents field. Now click **Save**.



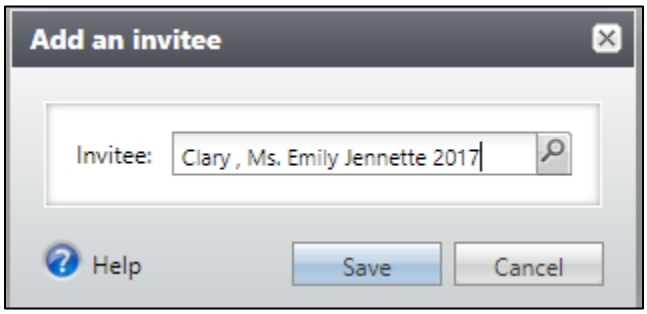
Note: To add multiple selections, repeat Steps 16-19.

Step 20. To add individuals one at a time, click **Add** and choose **Constituent**.

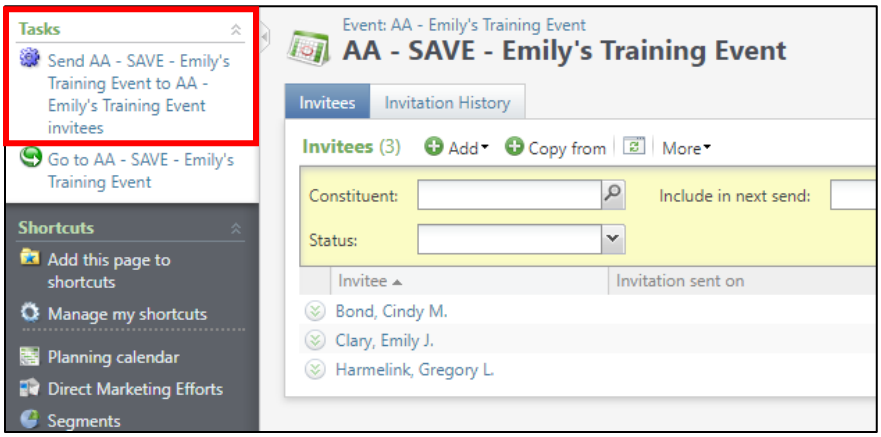


Step 21. Search for the constituent in the Invitee field.

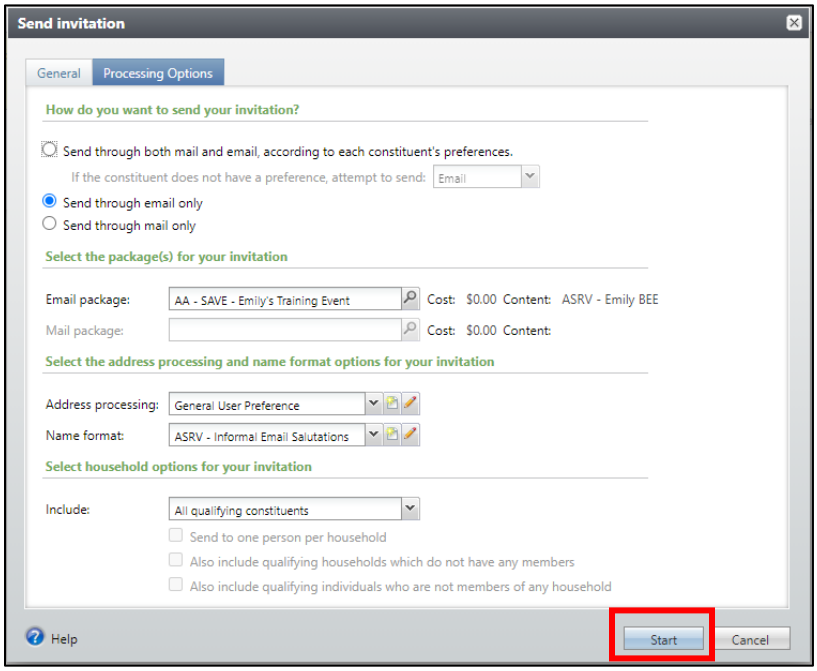
Note: You will notice there is nowhere to include solicit codes when you use this function. You are responsible for checking the constituent record to confirm they don't have any solicit codes that would exclude them from receiving your communication.



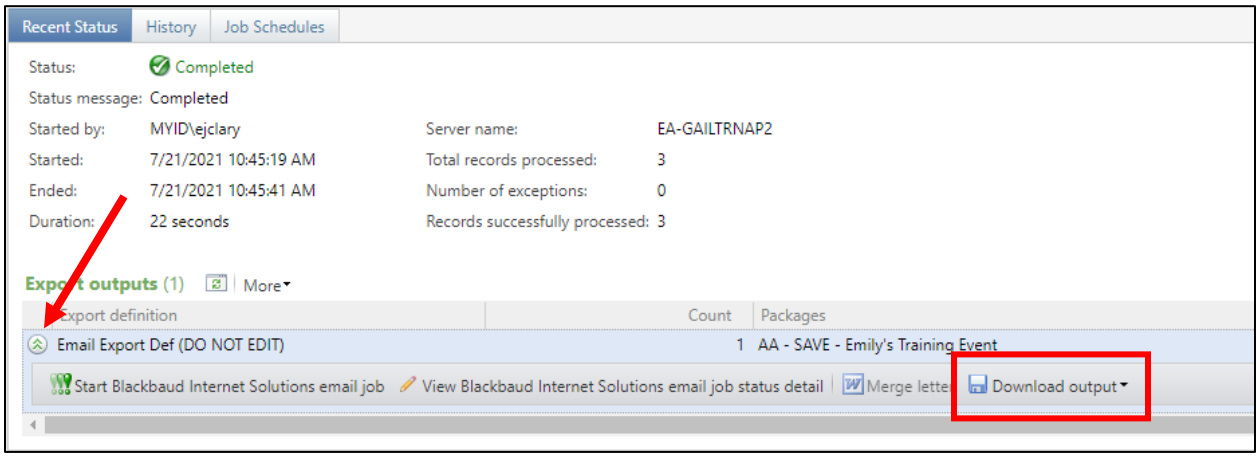
Step 22. Once your invitee list is complete, click the purple gear in the top left corner that reads **Send + the name of your invitation**. This will tag all the constituent records with your communication and prepare the excel file of contact information for you to download and review.



Step 23. Review all of your invitation settings, then click **Start**.



Step 24. When the process has finished, click the dropdown arrow under Export Outputs. Click **Download Output** and review your file for incorrect name formats and missing contact information.



Step 25. When you have reviewed your list and removed any extra information, you may send it to your printer provided that:

- **Your printer has a Non-Disclosure Agreement on file in GAIL**
    - If not, you can start a form here using Docusign.
- **You share the file using SendFiles**
    - Your printer will be able to create a temporary account to receive the file, learn how here.

This guide was last updated on 7/22/2021.