

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.

The screenshot shows the event management interface for "AA - Emily's Training Event". The event details include: Event date: 7/30/2021, Site: Alumni Association, Location: (blank), Room/Unit: 8-10008131, Contact: (blank), Coordinator: (blank), and Category: Educational. The status is "Active". There are two progress indicators: "Event expenses" showing 0% of budget (Expense budget: \$0.00, Agreed expenses: \$0.00, Amount paid: \$0.00) and "Event capacity" showing 0% of capacity (Event capacity: 0, Will attend: 0, Will not attend: 0). The "Invitations" tab is highlighted with a red box, and the "Add" button next to "Invitations (0)" is also highlighted.

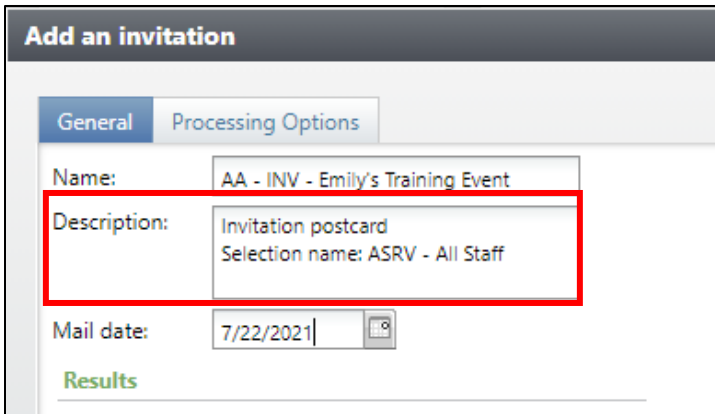
Step 2. Click **Add**.

This screenshot is identical to the previous one, showing the event management interface. The "Add" button next to "Invitations (0)" is highlighted with a red box.

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

The screenshot shows the "Add an invitation" form. The "Name" field is highlighted with a red box and contains the text "AA - INV - Emily's Training Event". The "Description" field contains "Invitation postcard" and "Selection name: ASRV - All Staff". The "Mail date" field contains "7/22/2021".

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



Add an invitation

General Processing Options

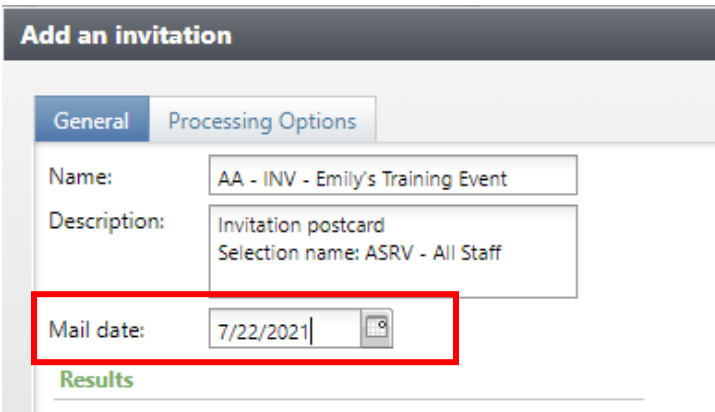
Name: AA - INV - Emily's Training Event

Description: Invitation postcard
Selection name: ASRV - All Staff

Mail date: 7/22/2021

Results

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



Add an invitation

General Processing Options

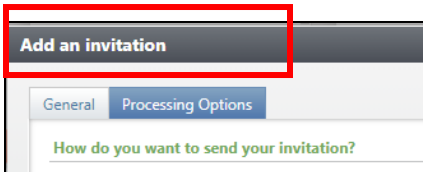
Name: AA - INV - Emily's Training Event

Description: Invitation postcard
Selection name: ASRV - All Staff

Mail date: 7/22/2021

Results

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

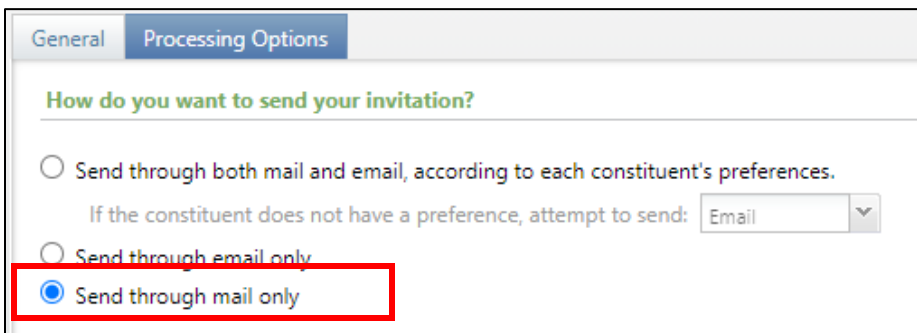


Add an invitation

General Processing Options

How do you want to send your invitation?

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



General Processing Options

How do you want to send your invitation?


Send through both mail and email, according to each constituent's preferences.
If the constituent does not have a preference, attempt to send: Email


Send through email only

Send through mail only

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

Select the package(s) for your invitation

Email package:  Cost: \$0.00 Content:


Mail package:  Cost: \$0.00 Content:

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

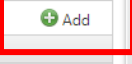
Batch Direct Marketing Package Search

Name: Cost: Search

Description: Category: Clear

Code: Site: 

Match all criteria exactly

Results 

Name	Description
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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**.

Add mail package

Package details

Name: AA - INV - Emily's Training Event

Description: postcard invitation

Site: Alumni Association 

Category: School/Unit

Package code: Package OHU

Channel code: Mail M


Costs


Base cost: \$0.0000 Distribution: Per piece

Additional content cost: \$0.0000

Total per piece cost: \$0.0000

Primary content

Letter: 

Export definition: ASRV - Events Basic Export 

Help Save Cancel

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.

Select the address processing and name format options for your invitation

Address processing: ASRV - Primary and Residence

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)

Address processing: ASRV - Primary and Residence

Name format: Events - Preferred Name Format

Address processing: ASRV - Primary and Residence

Name format: Preferred Name Format

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

Select household options for your invitation

Include: Qualifying individuals and organizations

Send to one person per household

Also include qualifying households which do not have any members

Also include qualifying individuals who are not members of any household

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**.

Tasks/Coordinators Options **Invitations** Registrations Pending Registrations

Invitations (1) + Add [icon] More

Name

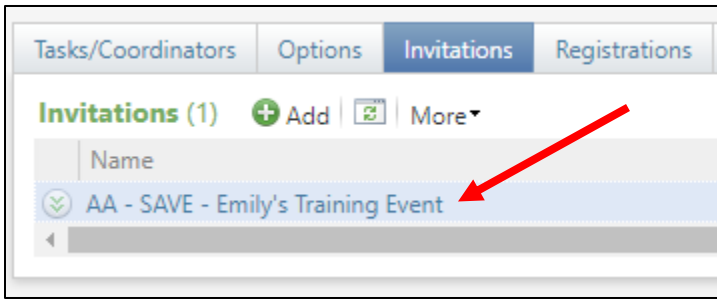
AA - SAVE - Emily's Training Event

Edit Delete Send

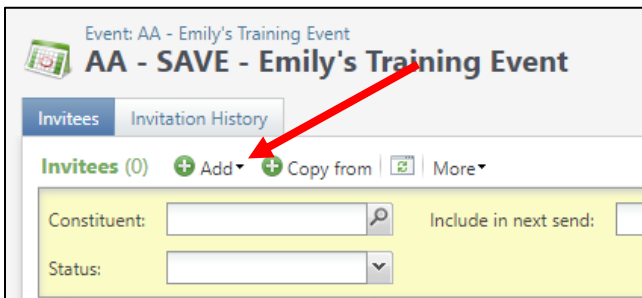
Invitations to be sent: 0 Marked for invitation resend: 0 Registered invitees:

Sent invitations: 0 Sent invitations with no response: 0 Declined invitees:

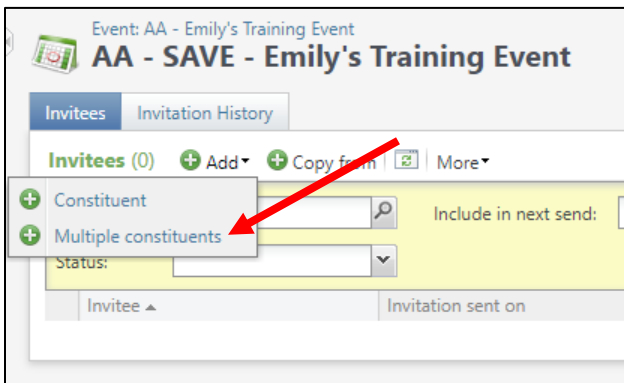
Step 15. To add invitees to your invitation, click on the name.



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

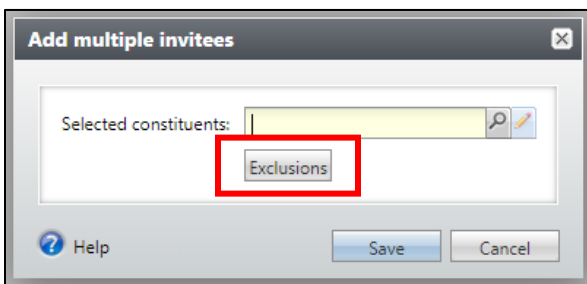


Step 17. To add a selection of invitees, choose **Multiple Constituents** from the dropdown.



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**.



Exclusions

Consider exclusions as of:

Exclusions

Exclude constituents with the following solicit codes:

Solicit code
No University Contact
Do Not Mail
Do Not Mail - AA All Communications - Alumni Association

Exclude deceased constituents
 Exclude inactive constituents

Required Exclusions

Exclude constituents with the following solicit codes:

Solicit code

[Help](#)

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

Add multiple invitees

Selected constituents:

[Help](#)

Selection Search

Name:

Record type:

Format:

Site:

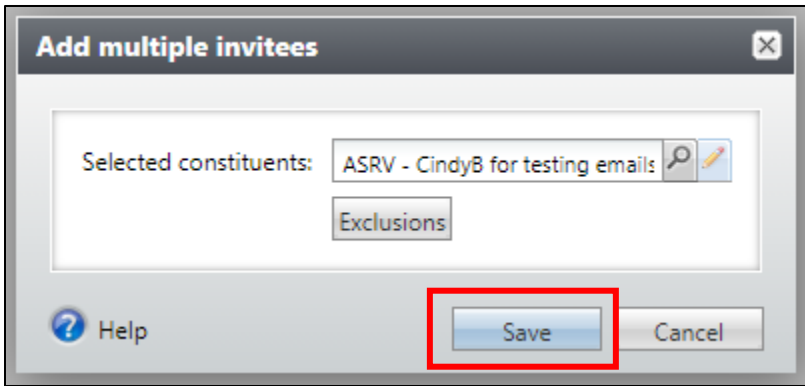
Include inactive

Results (More than 100 records found; only the first 100 rows are shown)

Name	Description
AA - \$1K+ Donors FY16-18 (Ad-hoc Query)	all \$1K+ donors from 7/1/15-6/30/18
AA - \$1K+ FY14 Valdosta Area Donors (Ad-hoc Query)	all \$1K+ FY14 donors in counties requested
AA - \$5K+ Lifetime Donors (Ad-hoc Query)	all \$5K+ cumulative, lifetime donors to any fund
AA - \$60+ 1961 Donors Already Acknowledged (Ad-hoc Query)	Exclude constituents who've already received a \$6
AA - \$60+ 1961 FY Donors (Ad-hoc Query)	Change FY at start of every new FY
AA - (Living) Current Executive Committee (Ad-hoc Query)	Living Current Executive Committee
AA - 1961 Auto-Email Template (Ad-hoc Query)	Listing of all 1961 that have received email templ
AA - 1961 Club Charter Members (Ad-hoc Query)	All FY18 donors to the Black Alumni Scholarship F
AA - 1961 Club Recurring Gift Donors for engagement (Ad-hoc Q...	All living active recurring gift donors to the Black .
AA - 1961 Society Club Members - All (Ad-hoc Query)	Everyone who qualified as being a 1961 Club men
AA - 2008-13 Alumni in New York City (Ad-hoc Query)	
AA - 2014 Dawq Trot 5K Attendees (Ad-hoc Query)	all attendees for the 2014 Dawq Trot 5K for Schol

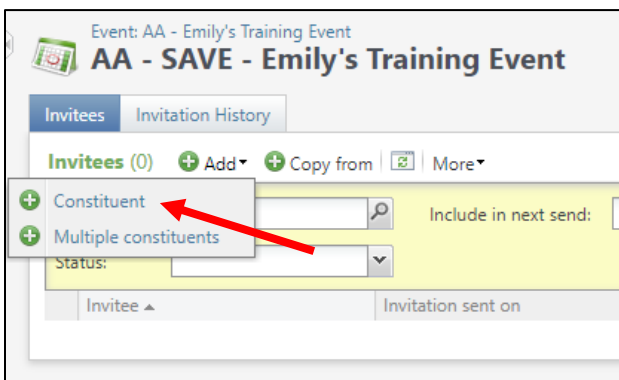
[Help](#)

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



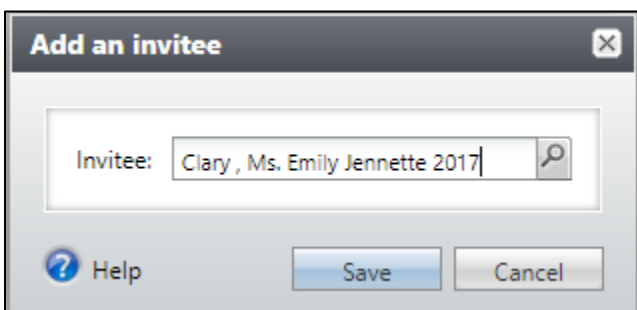
Note: To add multiple selections, repeat Steps 16-19.

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

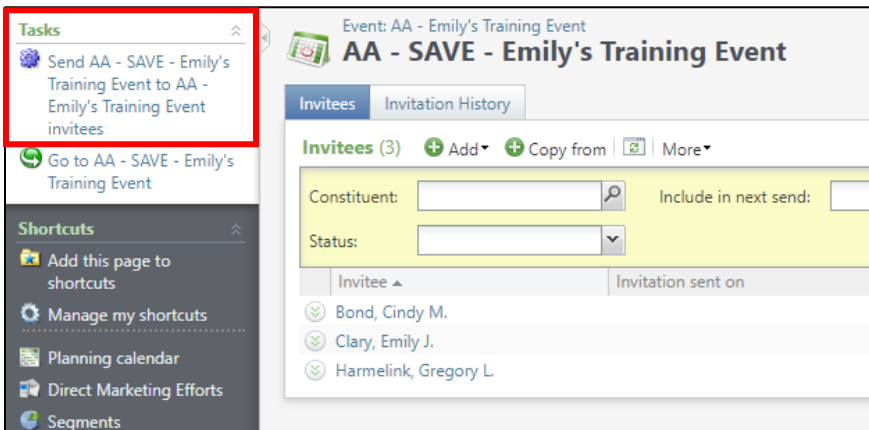


Step 21. Search for the constituent in the Invitee field.

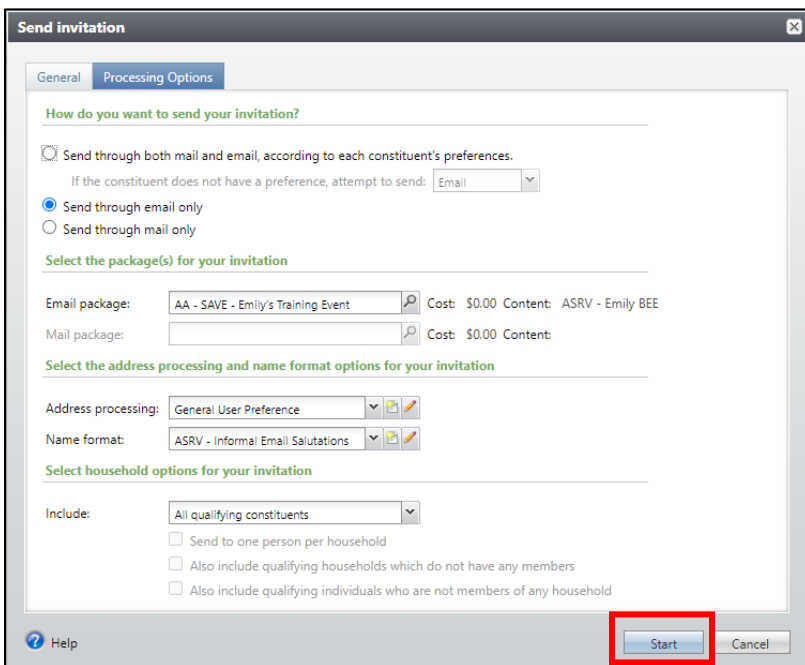
Note: You will notice there is nowhere to include solicit codes when you use this function. You are responsible for checking the constituent record to confirm they don't have any solicit codes that would exclude them from receiving your communication.



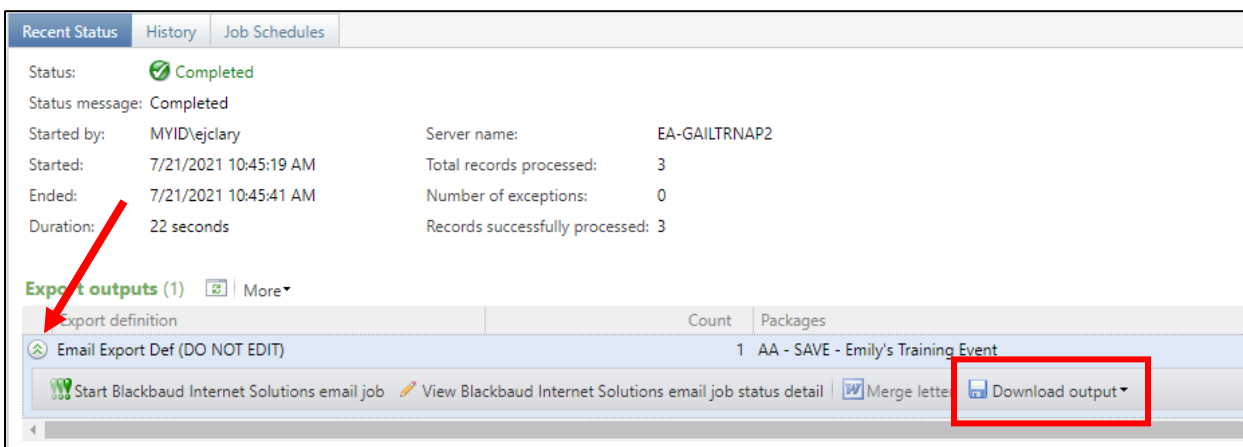
Step 22. Once your invitee list is complete, click the purple gear in the top left corner that reads **Send + the name of your invitation**. This will tag all the constituent records with your communication and prepare the excel file of contact information for you to download and review.



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.