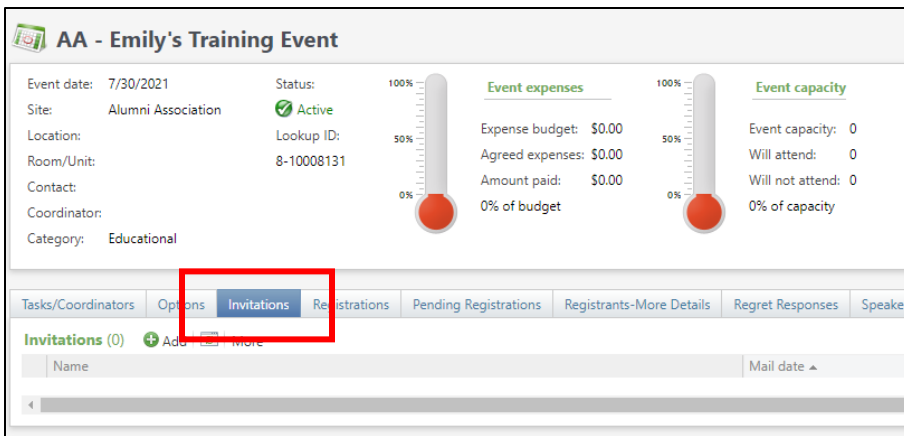


How to Send an Email Invitation

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

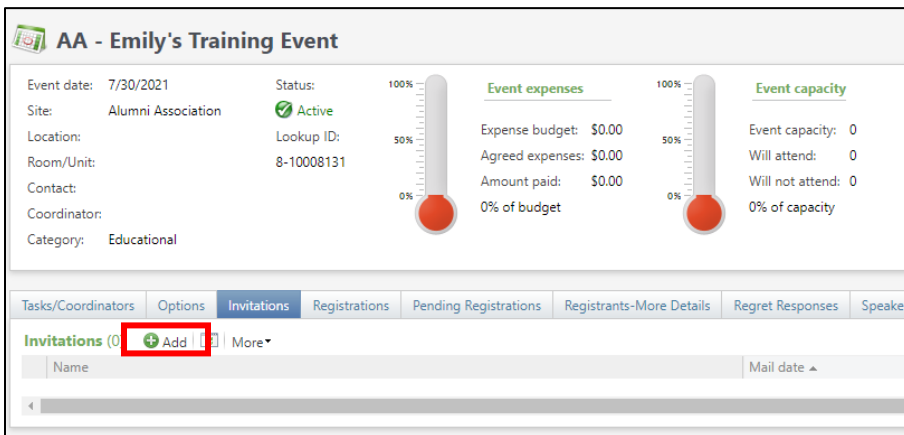
- [How to Create a Single-Level Event](#)
- [How to Create a BEE Email](#)
- [How to Submit an AskIT Ticket](#)

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



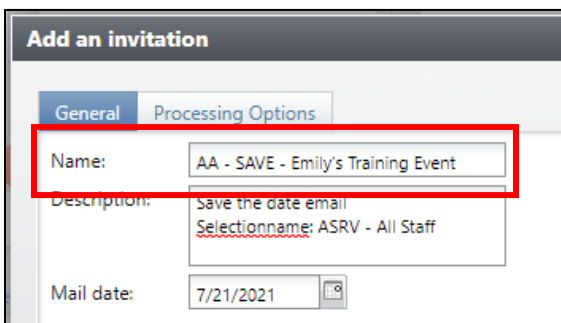
The screenshot shows the GAIL interface for an event titled "AA - Emily's Training Event". The event details include: Event date: 7/30/2021, Site: Alumni Association, Location: Room/Unit: 8-10008131, Status: Active, and Category: Educational. There are two progress indicators: "Event expenses" showing 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 navigation tabs at the bottom are: Tasks/Coordinators, Options, **Invitations** (highlighted with a red box), Registrations, Pending Registrations, Registrants-More Details, Regret Responses, and Speakers. Below the tabs, the "Invitations (0)" section has an "Add" button and a "More" dropdown menu.

Step 2. Click **Add**.



This screenshot is identical to the previous one, but the "Add" button in the "Invitations (0)" section 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 with two tabs: "General" and "Processing Options". The "Name" field is highlighted with a red box and contains the text "AA - SAVE - Emily's Training Event". The "Description" field contains "Save the date email" and "Selectionname: ASRV - All Staff". The "Mail date" field is set to "7/21/2021".

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

Add an invitation

General Processing Options

Name: AA - SAVE - Emily's Training Event

Description: Save the date email
Selectionname: ASRV - All Staff

Mail date: 7/21/2021

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

Add an invitation

General Processing Options

Name: AA - SAVE - Emily's Training Event

Description: Save the date email
Selectionname: ASRV - All Staff

Mail date: 7/21/2021

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

Add an invitation

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

Select the package(s) for your invitation

Email package: [] Cost: \$0.00 Content:
Mail package: [] Cost: \$0.00 Content:

Select the address processing and name format options for your invitation

Address processing: ASRV - Primary and Residence
Name format: Preferred Name Format

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

Help Save Cancel

Step 7. Choose Send through Email 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 Email Package.

Select the package(s) for your invitation

Email package: [Text Box] [Magnifying Glass] Cost: \$0.00 Content:

Mail package: [Text Box] [Magnifying Glass] Cost: \$0.00 Content:

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

Batch Direct Marketing Package Search

Name: [Text Box] Cost: [Text Box] Search

Description: [Text Box] Category: [Dropdown] Clear

Code: [Text Box] Site: [Text Box] [Magnifying Glass]

Match all criteria exactly

Results [+ Add]

Name	Description
------	-------------

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 Email from the Channel Code dropdown menu. A code will be generated for you.
- In the Message field, search for the name of your BEE email. "Email Export Def – DO NOT EDIT" will auto-populate into the Export Definition field.
- Click **Save**.

Add email package

Package details

Name: AA - SAVE - Emily's Training Event

Description: Save the date

Site: Alumni Association

Category: School/Unit

Package code: Package OHT

Channel code: Email E

Costs

Base cost: \$0.0000 Distribution: Per piece

Additional content cost: \$0.0000

Total per piece cost: \$0.0000

Primary content

Message: ASRV - Emily BEE

Export definition: Email Export Def (DO NOT EDIT)

Help Save Cancel

Select the package(s) for your invitation

Email package: AA - SAVE - Emily's Training Event Cost: \$0.00 Content: ASRV - Emily BEE

Mail package: Cost: \$0.00 Content:

Step 11. Change the Address Processing Option to **General User Preference**. This is the only option that works for emails.

Select the address processing and name format options for your invitation

Address processing: General User Preference

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

- **ASRV – Informal Email Salutations** (to pull a nickname or a first name, i.e. Emily)
- **ASRV – Formal Email Salutations** (to pull a title and last name, i.e. Ms. Clary)

Select the address processing and name format options for your invitation

Address processing: General User Preference

Name format: Preferred Name Format

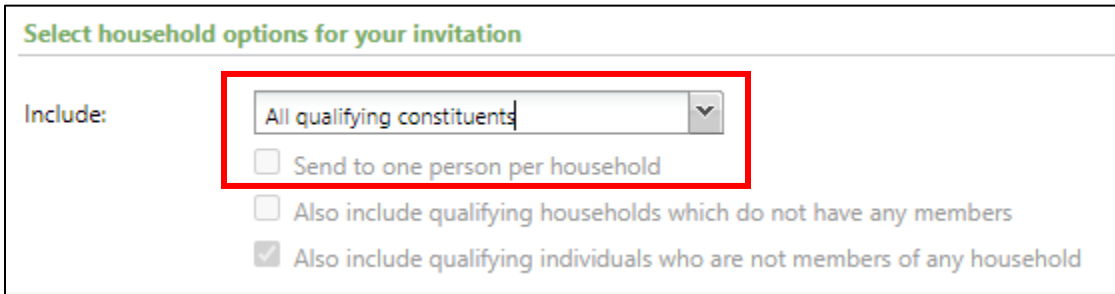
Select household options

Include: ASRV - Formal Email Salutations

ASRV - Informal Email Salutations

Note: If you did not use the salutation merge field in your BEE email, choose **ASRV – Informal Email Salutations**.

Step 13. Under the Household Options section, uncheck the box for “Send to One per Household” and change the dropdown menu to **All Qualifying Constituents**.



Select household options for your invitation

Include: All qualifying constituents ▼

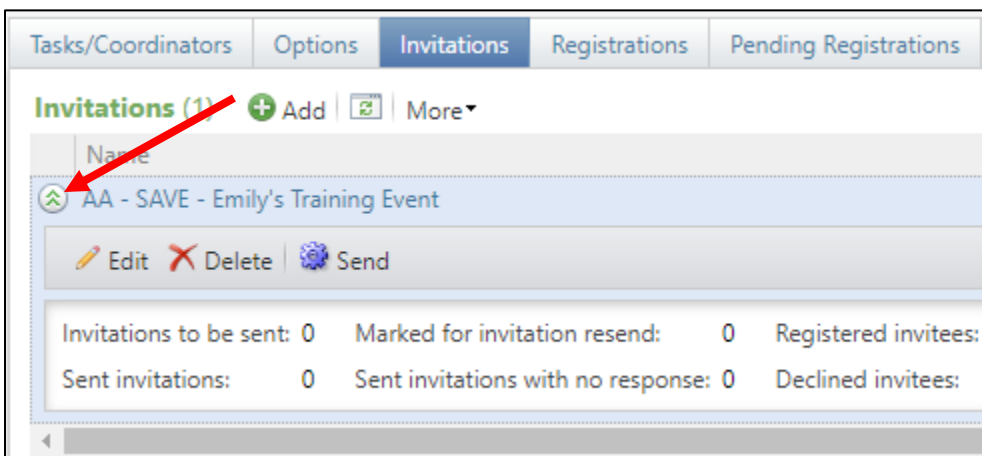
Send to one person per household

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

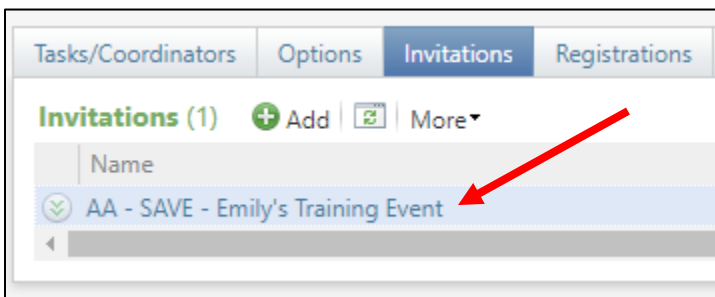
Invitations (1) + Add [grid icon] More ▼

Name
AA - SAVE - Emily's Training Event

Edit Delete Send

Invitations to be sent: 0 Marked for invitation resend: 0 Registered invitees: 0
Sent invitations: 0 Sent invitations with no response: 0 Declined invitees: 0

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

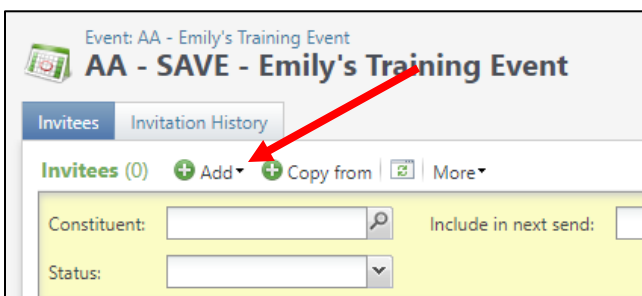


Tasks/Coordinators Options **Invitations** Registrations

Invitations (1) + Add [grid icon] More ▼

Name
AA - SAVE - Emily's Training Event

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



Event: AA - Emily's Training Event

AA - SAVE - Emily's Training Event

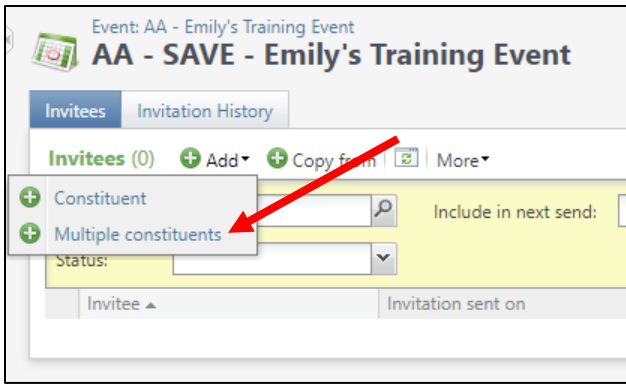
Invitees Invitation History

Invitees (0) + Add + Copy from [grid icon] More ▼

Constituent: [magnifying glass icon] Include in next send:

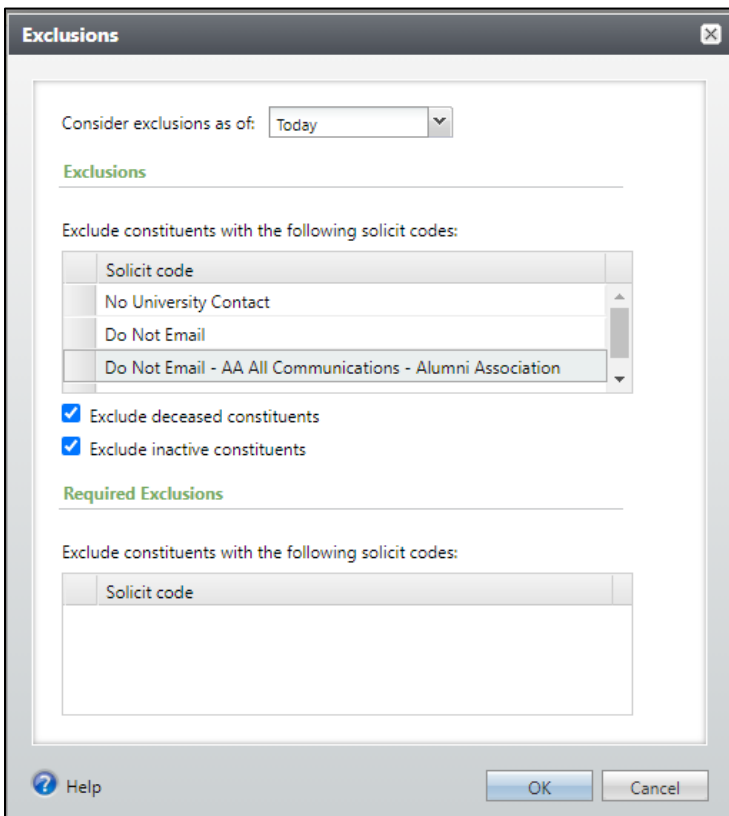
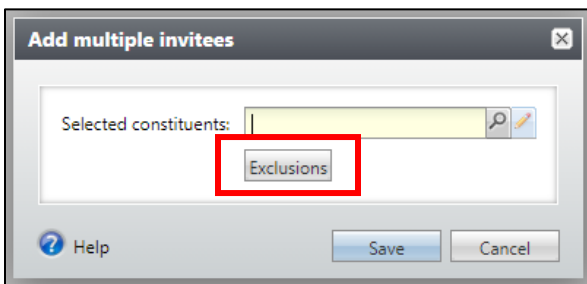
Status: ▼

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

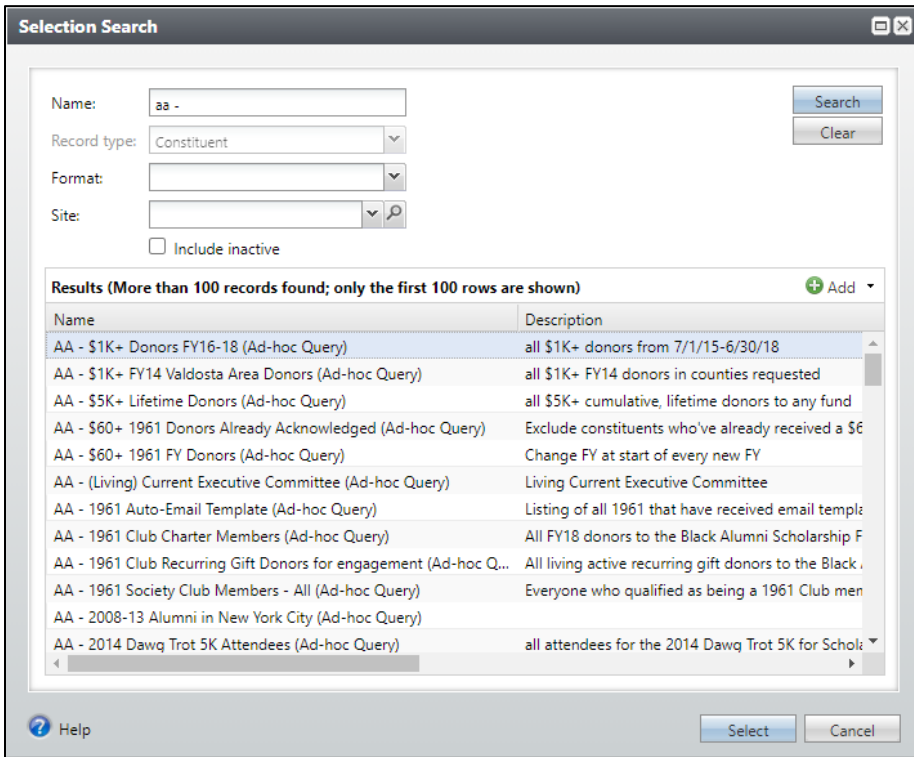
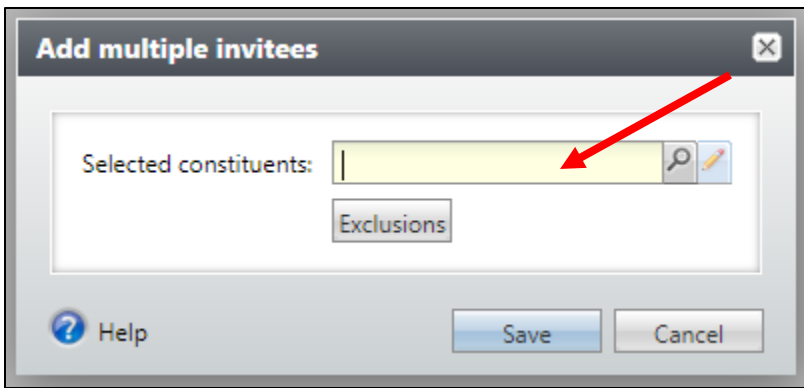


Step 18. Click the **Exclusions** button to edit your solicit codes. You will always need to edit these to reflect the settings of your invitation. **Do Not Email** and **No University Contact** are required for all email invitations. You will also need to add the **Do Not Email** code that is specific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

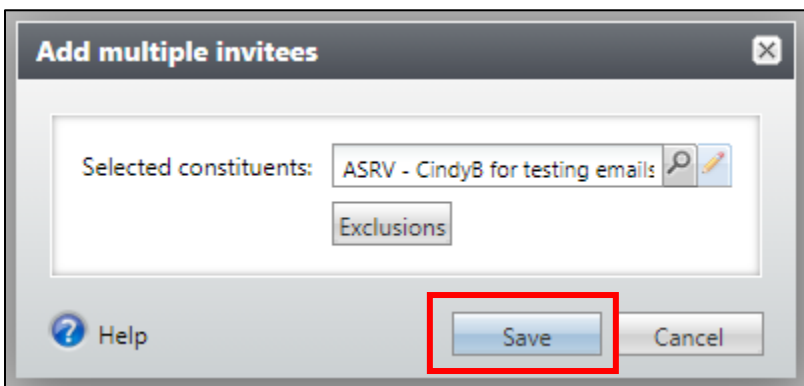
If your email is a solicitation, you will need **Do Not Solicit** as well as the **Do Not Solicit** code that is specific to your unit.



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

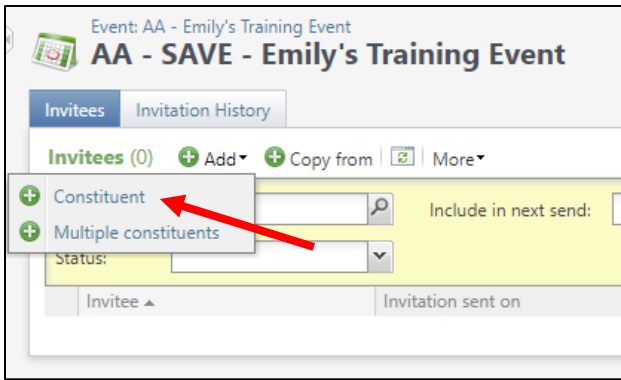


The selection name will populate into the Selected Constituents field. Now click **Save**.



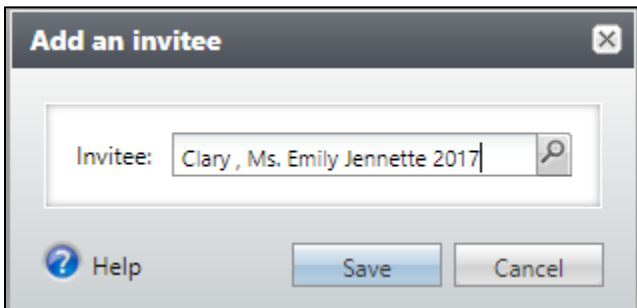
Note: To add multiple selections, repeat Steps 16-19.

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

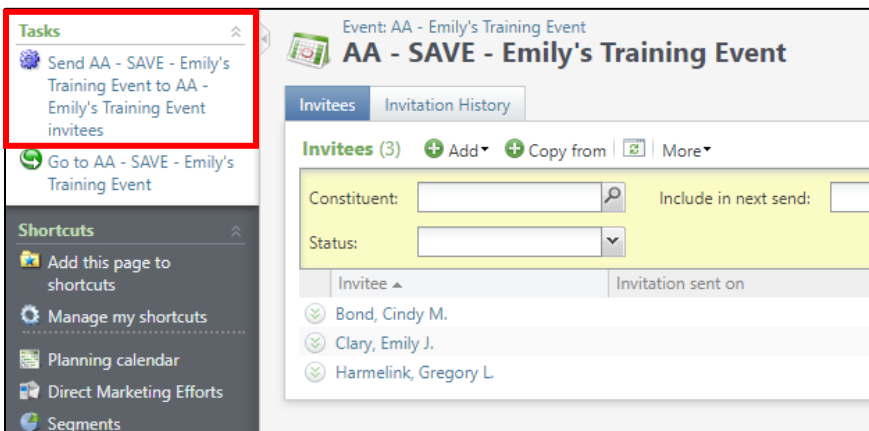


Step 21. Search for the constituent in the Invitee field.

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 not send your email. This will tag all the constituent records with your communication and prepare the excel file of contact information for you to review.



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

Send invitation

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

Select the package(s) for your invitation

Email package: AA - SAVE - Emily's Training Event Cost: \$0.00 Content: ASRV - Emily BEE

Mail package: Cost: \$0.00 Content:

Select the address processing and name format options for your invitation

Address processing: General User Preference

Name format: ASRV - Informal Email Salutations

Select household options for your invitation

Include: All qualifying constituents

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

Help Start Cancel

Step 24. When the process has finished, click the dropdown arrow next to Email Export Def – DO NOT EDIT. Click **Download Output** and review your file for incorrect salutations or missing email addresses.

Recent Status History Job Schedules

Status: ✔ Completed

Status message: Completed

Started by: MYID\ejclary Server name: EA-GAILTRNAP2

Started: 7/21/2021 10:45:19 AM Total records processed: 3

Ended: 7/21/2021 10:45:41 AM Number of exceptions: 0

Duration: 22 seconds Records successfully processed: 3

Export outputs (1) More

Export definition	Count	Packages
Email Export Def (DO NOT EDIT)	1	AA - SAVE - Emily's Training Event

Start Blackbaud Internet Solutions email job View Blackbaud Internet Solutions email job status detail Merge letter Download output

Step 25. When you have reviewed your list, click **Start Blackbaud Internet Solutions email job**. This will give you one last pop-up before sending your email.

Recent Status History Job Schedules

Status: ✔ Completed

Status message: Completed

Started by: MYID\ejclary Server name: EA-GAILTRNAP2

Started: 7/21/2021 10:45:19 AM Total records processed: 3

Ended: 7/21/2021 10:45:41 AM Number of exceptions: 0

Duration: 22 seconds Records successfully processed: 3

Export outputs (1) More

Export definition	Count	Packages
Email Export Def (DO NOT EDIT)	1	AA - SAVE - Emily's Training Event

Start Blackbaud Internet Solutions email job View Blackbaud Internet Solutions email job status detail Merge letter Download output

Step 26. If everything on the Start Email Job window is correct, click **Start**. **This will send your email.** It might take a few minutes depending on the size of your list.

	Package name	Email message	Email subject
<input checked="" type="checkbox"/>	AA - SAVE - Emily's Training Event	ASRV - Emily BEE	Will this email save????

Once your email hits inboxes, you are done. Congratulations!

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