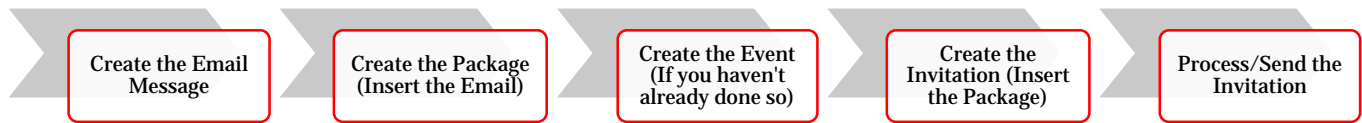
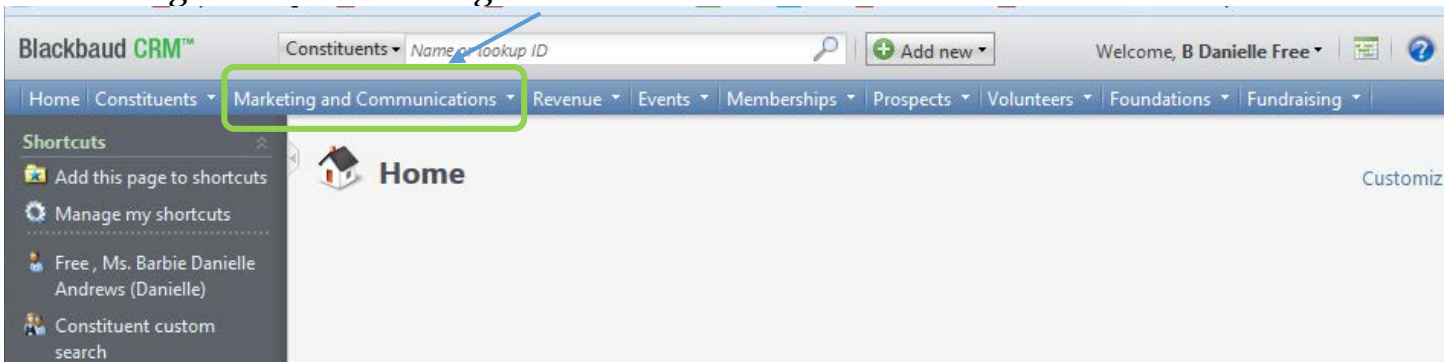


## 5 Steps to Processing Event Invitations via Email

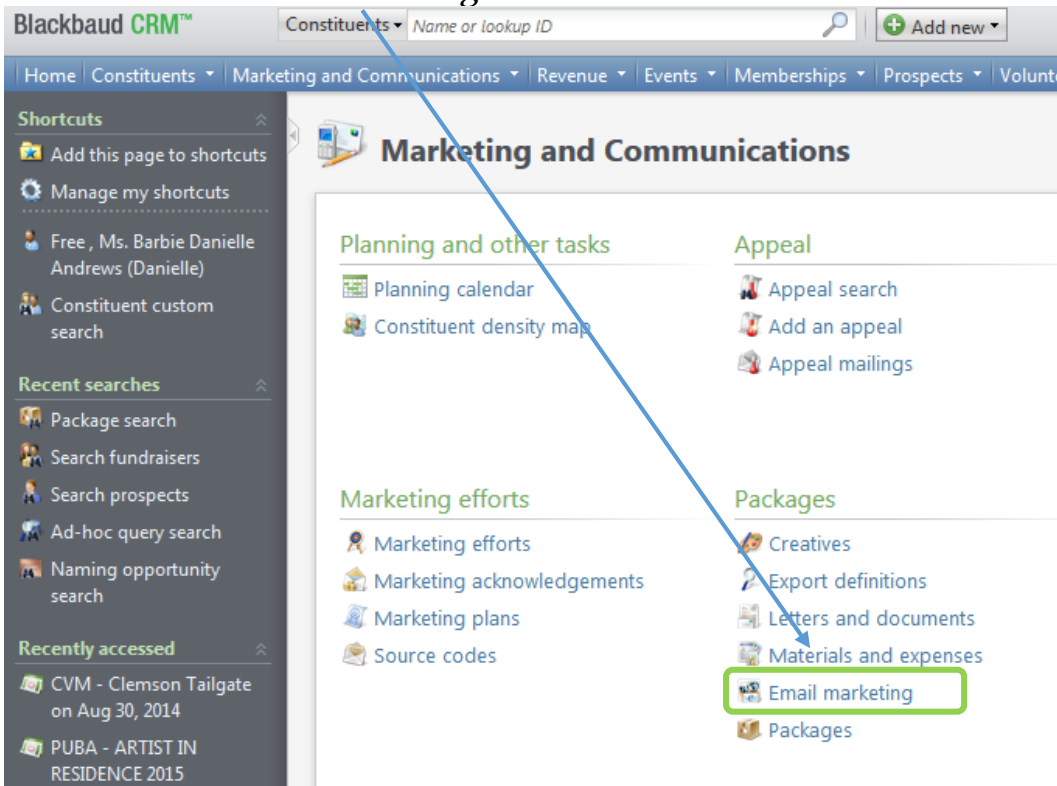


### Create the Email Message

*Navigate to the "Marketing and Communications" functional area.*



*Click on "Email marketing".*



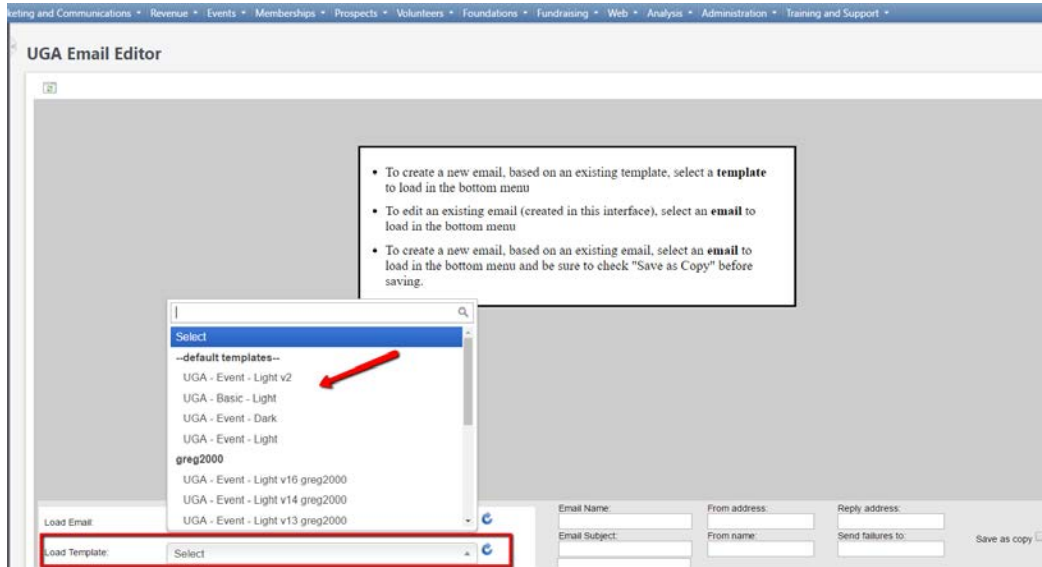
Click on *“Add from UGA email editor”*.

The screenshot shows a navigation menu at the top with options: Home, Constituents, Marketing and Communications, Revenue, Events, and Membership. On the left, there is a 'Shortcuts' sidebar with items like 'Add this page to shortcuts', 'Manage my shortcuts', 'Event search', 'Direct marketing efforts', 'Packages', 'Segments', and 'Export'. Below that is a 'Recent searches' section with items like 'Package search', 'Constituent search', 'Appeal search', 'Purpose search', and 'Ad-hoc query search'. The main content area is titled 'Marketing and Communications Email marketing' and contains a list of options: 'Email search', 'View emails', 'Add from UGA email editor' (highlighted with a red box), 'Add a direct marketing email', 'Add a membership email', and 'Add a sponsorship email'.

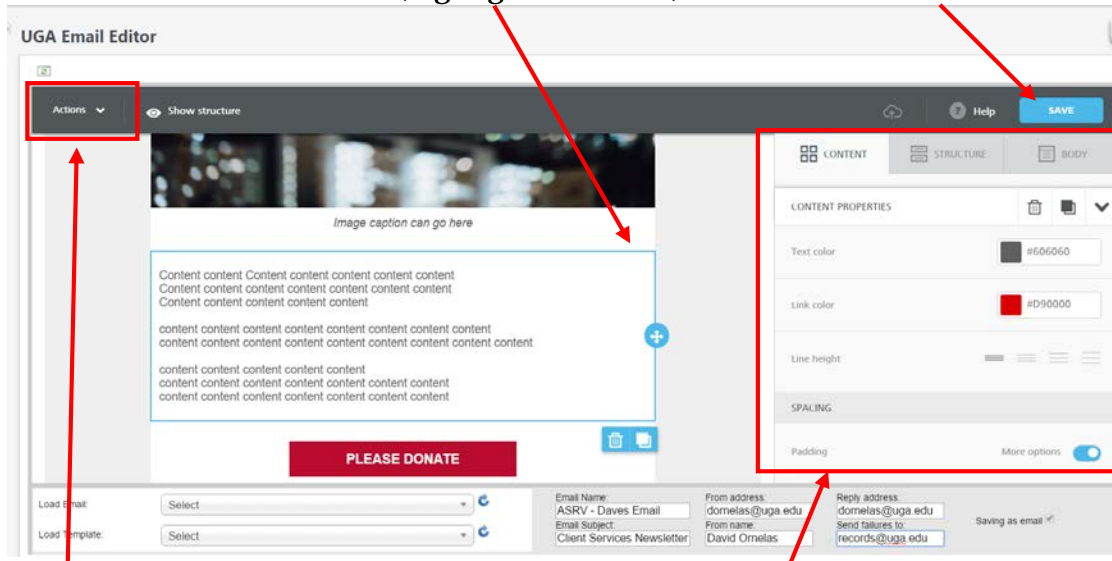
Log into the *Central Authentication Service* screen with your UGA myID and password.

The screenshot shows the 'UGA Email Editor' login screen. At the top, there is a navigation bar with various menu items. Below that, the 'UNIVERSITY OF GEORGIA' logo and 'Help Desk Systems Status' are visible. The main heading is 'CENTRAL AUTHENTICATION SERVICE (CAS)'. The login form is highlighted with a red box and contains the following elements: 'Enter your UGA MyID and Password', 'Your UGA MyID' input field, 'Password' input field, a blue 'Log in' button, and a link for 'Forgot your password?'. To the right of the form, there is a section titled 'UGA's Single Sign-on for Web Services' with explanatory text and a note about the transition to CAS for logging in.

Click on the *Load Template* drop down menu to select a default template or click the *Load Email* dropdown menu to select a previously created email.



Click on the content blocks (highlighted in blue) to edit.



**Actions:** Preview and test the email

**Content Formatter:** The content formatter houses the Content, Structure, and Body tabs. Use these tabs to make additional customizations.

**Name:** Name of the email (internal purposes) \*\*use your naming convention.

**Subject:** Subject line seen by constituents when they receive the email

**From address:** Email address the email shows as being sent from

**From name:** Name the email shows as being sent from

**Reply address:** Email address that replies should be delivered to

**Send failures to:** Email address that failures will be forwarded to \*\*enter [records@uga.edu](mailto:records@uga.edu)\*\*

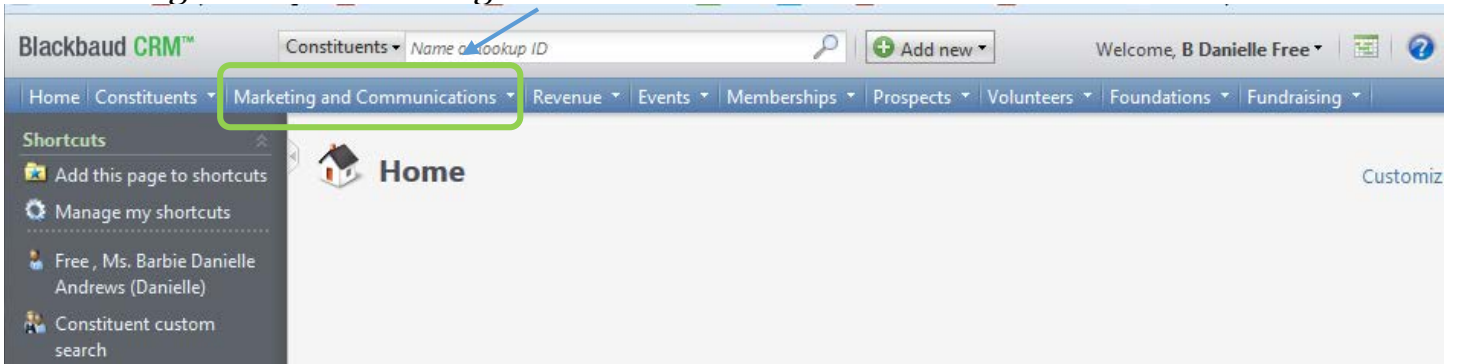
Highlight and link the Communication Preferences and Privacy Policy in the last content block by clicking on the Special links drop down menu.

The screenshot shows an email editor interface. At the top, there are 'Actions' and 'Show structure' options. The main content area contains placeholder text. A rich text editor toolbar is visible, including options for font (Arial, 14px), bold, italic, underline, strikethrough, link, unlink, and a 'Special links' dropdown menu. The 'Special links' menu is open, showing 'Privacy Policy', 'Communication Preferences', and 'Misc.' options. A red arrow points from the 'Special links' menu to the 'communication preferences | privacy\_policy | view in browser' text in the preview area, which is highlighted with a red box. At the bottom, there are fields for 'Load Email' and 'Load Template', and a metadata section with 'Email Name' (ASRV - Daves Email), 'Email Subject' (Client Services Newsletter), 'From address' (dornelas@uga.edu), and 'From name' (David Ornelas).

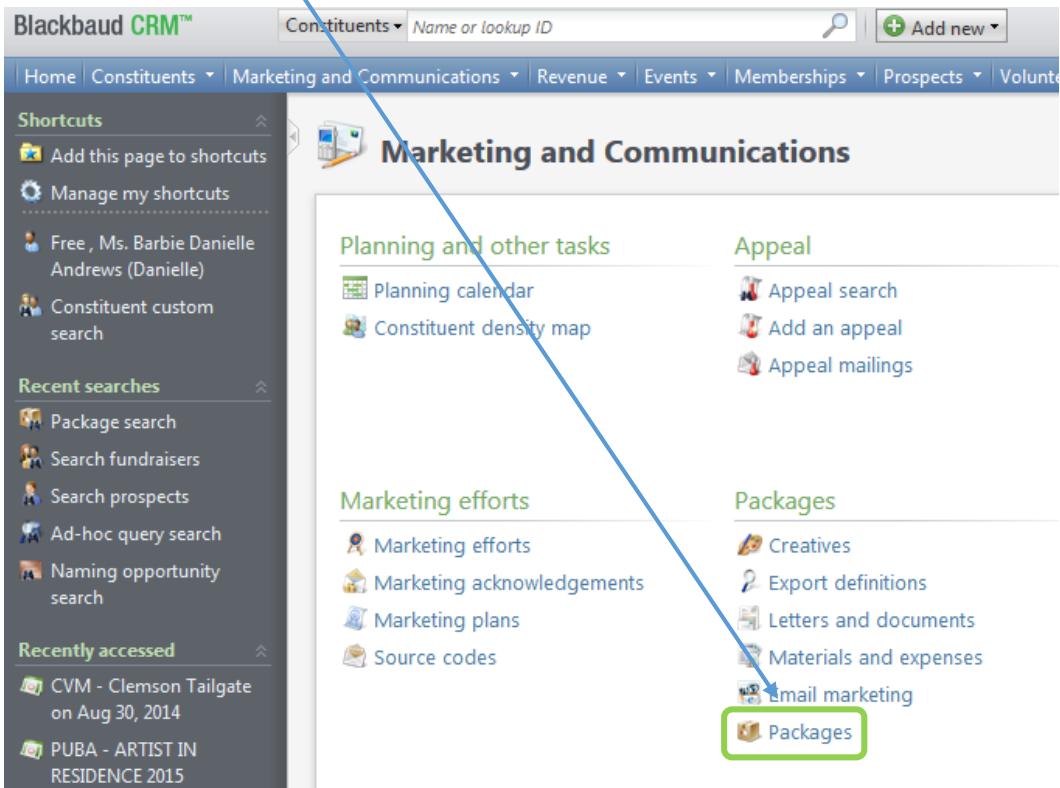
Save the email message.

## Create the Package

Navigate to the “Marketing and Communications” functional area.



Click on “Packages”.



Click on “Add an email package” and the screen below will appear.

**Add email package**

**Package details**

Name: ASRV – Homecoming Tailgate Package – Fall 2014

Description: Package for the Homecoming Tailgate Fall 2014.

Site: Development and Alumni Relations

Category: Social

Package code: Package

Channel code: Email

**Costs**

Base cost: \$0.0000 Distribution: Per piece

Additional content cost: \$0.0000

Total per piece cost: \$0.0000

**Primary content**

Message: ASRV – Homecoming Tailgate – Fall 2014

Export definition: Event Basic Export

Help Save Cancel

Save the package.

#### Package details

**Name:** Name the package using your naming convention. (You can use the same name that you used for your message)

**Description:** Select a brief description of the package itself

**Site:** Enter your site

**Category:** Select a category

**Package code:** Select “Package”

**Channel code:** Select “Email”

#### Costs

Not required but if you’d like to track costs you can do that here.

#### Primary content

**Message:** Search for and select your previously created email message.

**Export definition:** This will automatically populate based on the email message you enter in the field above.

## Create the Event

Navigate to the “Events” functional area. If you haven’t already done so you’ll need to add a new event. If you have, you’ll search for and select the existing event. **\*\*If you need additional information on how to create events please sign up for an events class [here](#)\*\***

**Prior to creating the event, please ensure to complete the following steps:**

1. Review the Planning Calendar in GAIL to avoid overlap in event or communication schedules
2. Submit an Event Approval Form to Jennifer Hancock if you are planning to process revenue through UGA Foundation Accounts

**\*For an event registration page, please submit a work request to the UGA Office of Communications (event registration options must first be approved by Jennifer Hancock).**

## Create the Invitation

From within the event click on the “Invitations” tab.

The screenshot shows the GAIL system interface for an event titled "BDF - Danielle's Test Event". The event details include: Event date: 7/24/2014, Status: Active, Site: Development and Alumni Relations, Location: 8-10000709, Room/Unit: 8-10000709, Contact: 8-10000709, Coordinator: 8-10000709, and Category: 8-10000709. There are two progress indicators: "Event expenses" at 0% of budget and "Event capacity" at 0% of capacity. The "Invitations" tab is highlighted with a green box and a blue arrow pointing to it from the text above.

Click “Add” to create a new invitation.

The screenshot shows the "Invitations" tab in the GAIL system. The "Add" button is highlighted with a green circle and a blue arrow pointing to it from the text above. The table below shows one invitation: "BDF - Danielle's Test Invitation" with a mail date of 7/24/2014 and a description of "test invite for the communications class on 7.24.2014."

Name	Mail date	Description
BDF - Danielle's Test Invitation	7/24/2014	test invite for the communications class on 7.24.2014.

The screen below will appear. Enter the “General” details.

**Add an invitation**

General Processing Options

Name:

Description:

Mail date:

Results

Create selection

Overwrite existing selection

Ignore this section.

### General

**Name:** Give your invitation a name using your naming convention. \*\*This will appear as the tag on any constituent’s record that receives the invitation\*\*

**Description:** Describe the invitation.

**Mail date:** This is the date that you plan to send the invitation. \*\*This can be a future date\*\*

Click on 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:

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:

Name format:

Select householding options for your invitation

Include:

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

### Processing Options

Select “Send through email only”

**Email Package:** Search for and select the email package you created previously.

**Address processing:** Select “ASRV – Primary and Residence” (This will remove anyone with a blank or invalid address).

**Name format:** Select “Preferred Name Format”

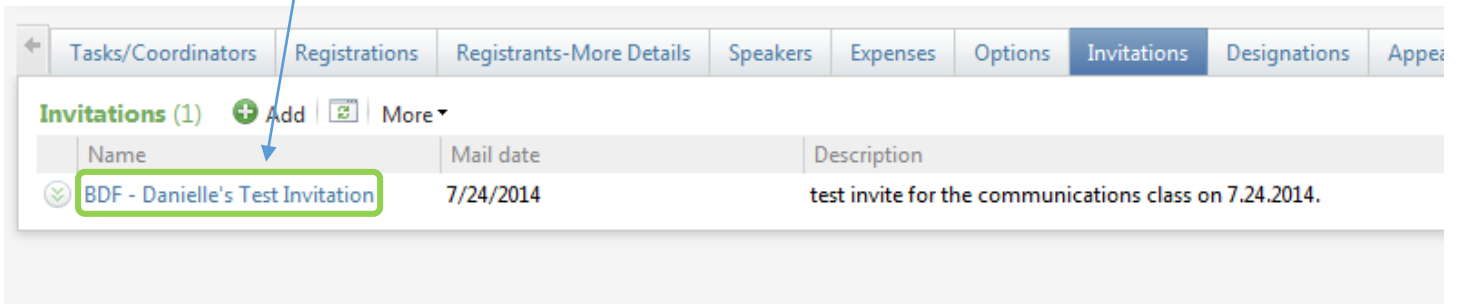
**Include:** Select “All qualifying constituents” \*\*This will send each individual in the invitee list an email invitation. \*\*

Save the invitation.

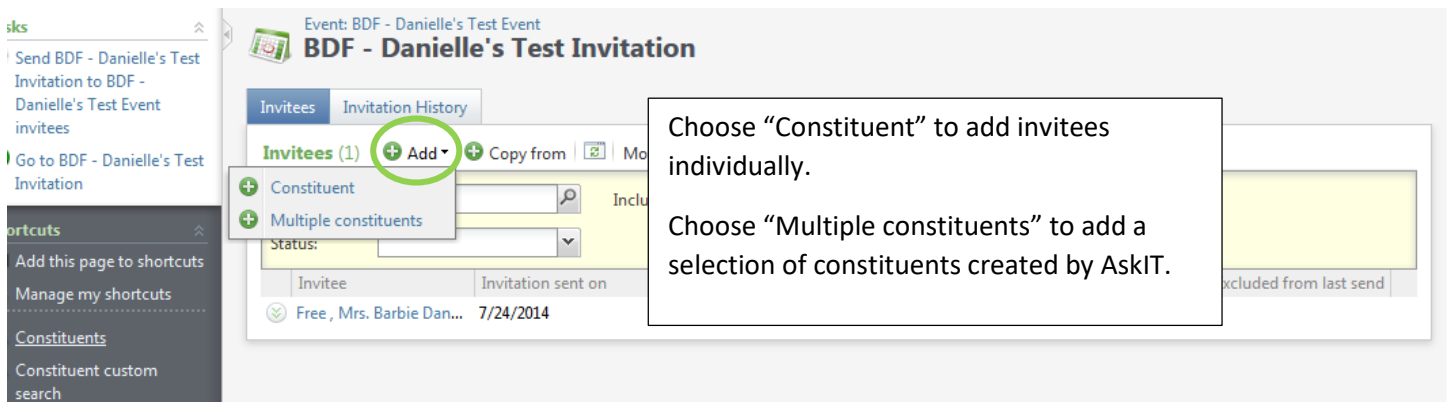


## Process and Send the Invitation

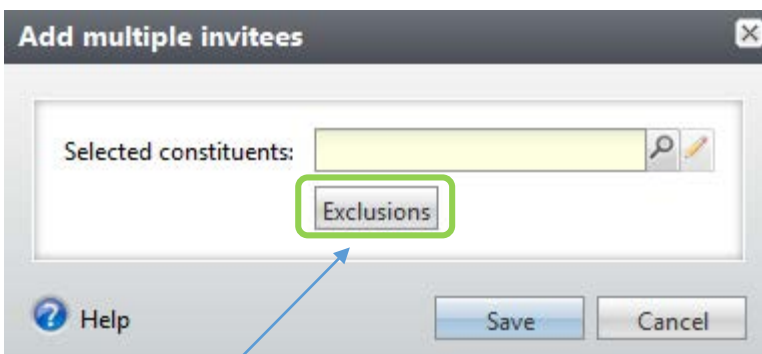
*Select and click on the desired invitation name to add invitees.*



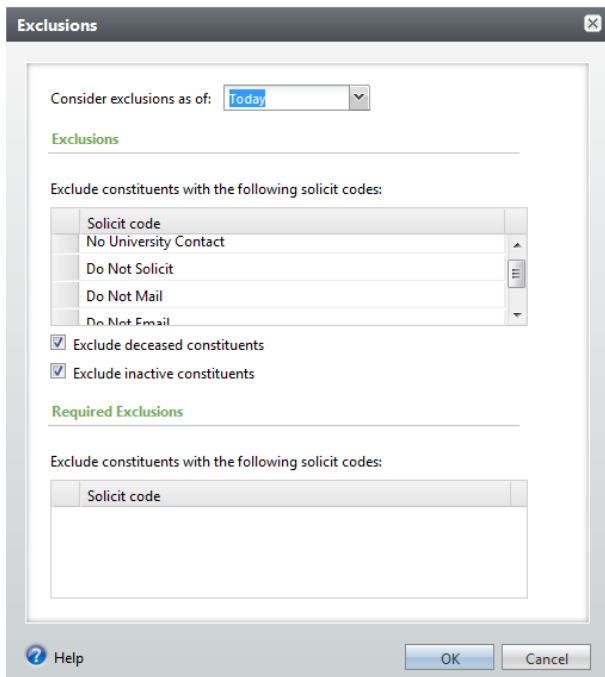
*The screen below will appear. Click "Add" to select your desired constituents.*



*When you select to add "Multiple constituents" the box below will appear. Search for and select the selection that you had AskIT create for you.*



*You must also process your own exclusions when you choose to add multiple constituents. Click "Exclusions" and the screen below will appear.*



Here, you will add/remove “solicit codes” that pertain to your email.

For example, if this were a College of Education email invitation the list of solicit codes would appear like this:

No University Contact

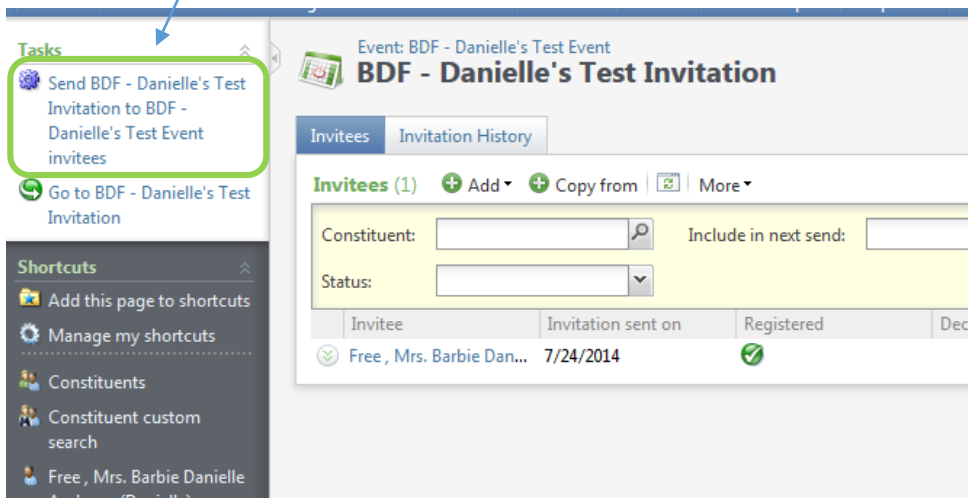
Do Not Email

Do Not Email – COE

\*If actively soliciting, please include the appropriate code *Do Not Solicit* to exclude constituents with this communication preference. Otherwise, delete *Do Not Solicit* and *Do Not Mail*.\*

*Click ok to save your exclusions.*

*When you are satisfied that your list of invitees is complete and you are ready to send the invitation “Send” the invitation. Click “start” when the next dialogue box appears. This is not the actual sending of the email, it is the process that tags constituent records.*



You will be redirected to a status screen. This screen is where you will select to actually SEND the invitation. Click the two green arrows beside the export definition name to expand more options. Click "Start Blackbaud Internet Solution email job" to schedule the send. Click "Download output" to download an Excel file of the invitees.

The screenshot shows the 'Invitee List' for 'BDF - Danielle's Test Invitation'. The event details are: Event: BDF - Danielle's Test Event, Name: BDF - Danielle's Test Invitation, Description: test invite for the communications class on 7.24.2014. The status is 'Completed' with a message 'Completed'. It started on 8/8/2014 at 4:17:03 PM and ended at 4:17:53 PM, lasting 50 seconds. The server name is EA-GAILTRNAP1, and 1 record was processed successfully with 0 exceptions.

The 'Export outputs' table is as follows:

Export definition	Count	Packages	Quantity	Status	Status date
CDAG - Direct Mail So...		BDF - Danielle's Test E...	1		
Start Blackbaud Internet Solutions email job		View Blackbaud Internet Solutions email job status detail		Merge letter	Download output

When the dialog box below appears, enter the date the marketing effort will be sent out in the send date field. **\*\*\*IMPORTANT: Once you click start you cannot undo this process.\*\*\***

The 'Start email jobs' dialog box contains the following information:

- Send date: 12/9/2015
- Time: 5:21 PM
- Table with columns: Package name, Email message, Export definition. The first row is checked.
- Buttons: Start, Cancel
- Help icon

**Manually enter the official date and time you want this communication to enter the BlackBaud email queue to officially launch.**

**\*Please ensure that a non-disclosure form has been signed before sharing information with an individual or vendor outside of GAIL. When sharing data all documents must be sent through the SendFiles application. <http://dar.uga.edu/GAIL/ask-it/>**

**Once the appropriate mandatory forms have been received, then you may use UGA's secure file transmittal method of [SENDFILES](#). Do not ever send GAIL data through regular email as it is not secure by any means.**