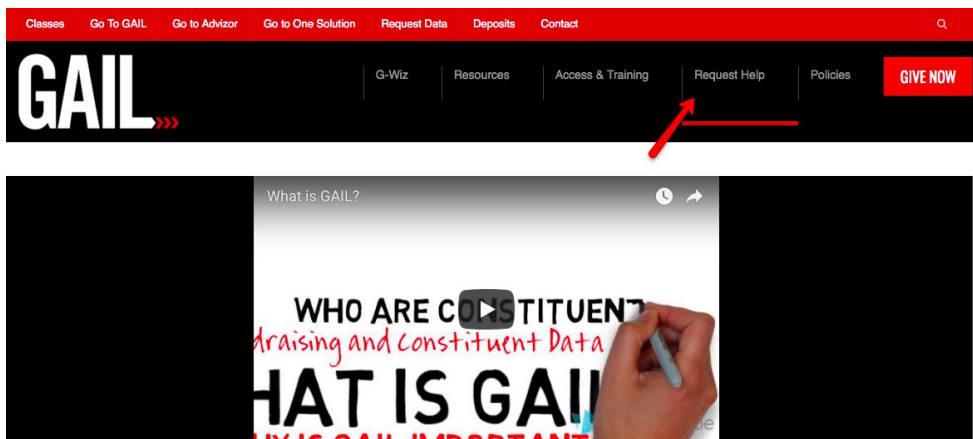


## How to Process an Email Direct Marketing Effort

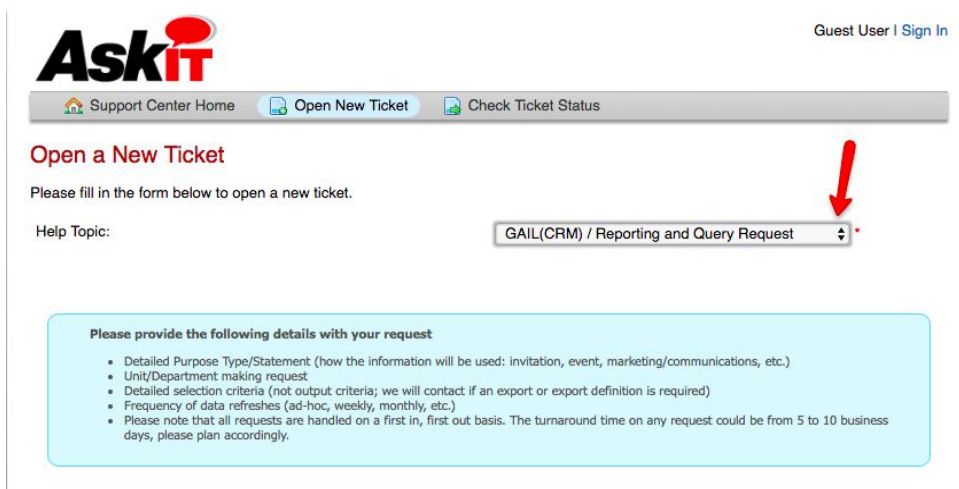
**Step 1. Request the Selection** (A selection is the list of individuals you are trying to reach with your communication.)

**Important Note:** If you have already requested a specific selection and used it in other marketing efforts, you do not need to request it again. **Skip Step 1 and Step 2.**

To request a *new* selection, navigate to the GAIL resources website at [www.dar.uga.edu/GAIL](http://www.dar.uga.edu/GAIL) and click the **Request Help** button at the top of the page.



A new IT ticket will be opened on the next screen. Change the *Help Topic* to **Reporting and Query Request** and complete your ticket details with the information provided in the blue box.

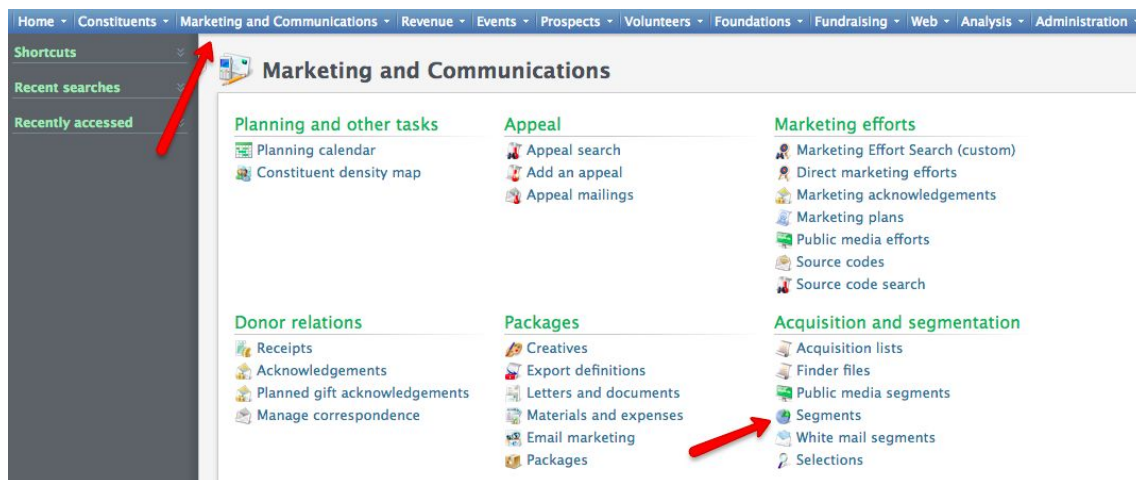
The image shows the 'AskIT' 'Open a New Ticket' form. At the top left is the 'AskIT' logo. At the top right is the text 'Guest User | Sign In'. Below the logo are three buttons: 'Support Center Home', 'Open New Ticket', and 'Check Ticket Status'. The main heading is 'Open a New Ticket'. Below this is the instruction 'Please fill in the form below to open a new ticket.' The 'Help Topic:' label is followed by a dropdown menu that has 'GAIL(CRM) / Reporting and Query Request' selected. A red arrow points to this dropdown menu. Below the form is a light blue box with the heading 'Please provide the following details with your request' and a list of bullet points: 'Detailed Purpose Type/Statement (how the information will be used: invitation, event, marketing/communications, etc.)', 'Unit/Department making request', 'Detailed selection criteria (not output criteria; we will contact if an export or export definition is required)', 'Frequency of data refreshes (ad-hoc, weekly, monthly, etc.)', and 'Please note that all requests are handled on a first in, first out basis. The turnaround time on any request could be from 5 to 10 business days, please plan accordingly.'

After you submit your selection request via ticket, you will receive an email response from the Query team with the name of your new selection. The selection name will begin with your naming convention and follow with a brief criteria description. (Ex. LAW - All Living Alumni) While you're waiting on your selection to be created, you can move on to **Step 3**.

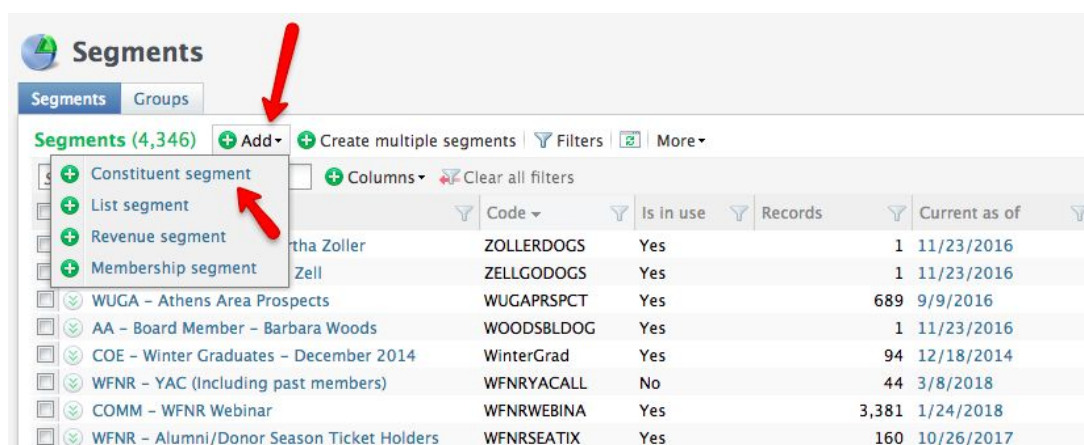
## Step 2. Create the Segment (A segment is the container that holds the selection.)

**Important Note:** This step should *only* be completed if a brand new selection was requested in **Step 1**. Once a segment has been created, you can use it in multiple future marketing efforts.

To create a segment that corresponds with your newly created selection, navigate to the marketing and communications functional area, click Segments.



At the top of the new page, click the **Add** button and choose **Constituent Segment**.



When the new pop-up window appears, click the **Add** button underneath the selections header.

**Add constituent segment**

Details Groups

Name:

Description:

Site:

Category:

Code:

**Selections:**

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

In the name field, search for and choose the name of your selection. (**Reminder:** The selection is the list of individuals you are trying to contact.) The name of your selection will have been provided to you by the Query team via email and it will begin with your naming convention.

**Marketing Selection Search**

Name:  Site:

Description:  Record type:

Category:    Match all criteria exactly

**Results (10 records found)**

Name	Record type	Category	Current as of	Records	Site
TCOB - All Living Alumni (grads only) (Ad-hoc Query)	Constituent		8/8/2018	70333	
TCOB - All Living Accounting Alumni (Ad-hoc Query)	Constituent		7/31/2018	9161	
TCOB - All Living Alumni (includes Matrics) (Ad-hoc Query)	Constituent		7/25/2018	72511	
TCOB - All Living MBA Alumni (Ad-hoc Query)	Constituent		6/13/2018	7285	

Once you have chosen your selection from the results list, name your segment to match. (You will need to remember this name later when you are finalizing your marketing effort.)

Details Groups

Name: TCOB - All Living Alumni

Description:

Site:

Category:

Code:

**Selections:**

+ Add Edit X Delete

Name	Description
TCOB - All Living Alumni...	All living, graduated alumni

Enter a brief description that defines your segment. Then, choose your school/college/unit from the *Site* drop-down menu. For the *Category*, you will always choose **School/Unit**.

Details Groups

Name: TCOB - All Living Alumni

Description: All living alumni that have graduated from the Terry College of Business

Site: Business

Category: School/Unit

Code:

Choose, **Segment Code** from the *Code* drop-down menu. In the yellow highlighted field, enter a **10-digit** code consisting of letters and numbers. The code should always begin with your naming convention and current fiscal year. (ex. TCOB19ALUM, COE18DONOR)

Details Groups

Name: TCOB - All Living Alumni

Description: All living alumni that have graduated from the Terry College of Business

Site: Business

Category: School/Unit

Code: Segment Code [?????????]

When you have entered a complete 10-digit code, the yellow highlighted field will turn white. Click **Save** when you are finished.

Add constituent segment

Details Groups

Name: TCOB - All Living Alumni

Description: All living alumni that have graduated from the Terry College of Business

Site: Business

Category: School/Unit

Code: Segment Code TCOB18ALUM

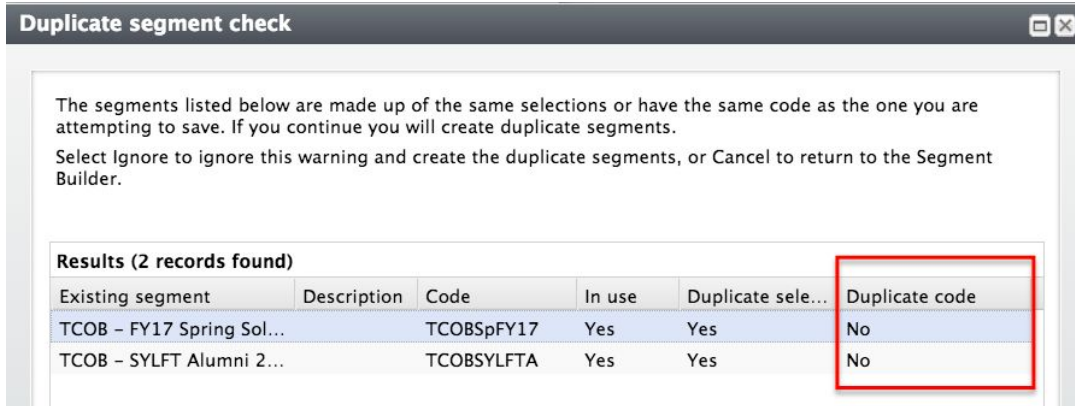
**Selections:**

+ Add ✎ Edit ✕ Delete

Name	Description
TCOB - All Living Alumni...	All living, graduated alumni

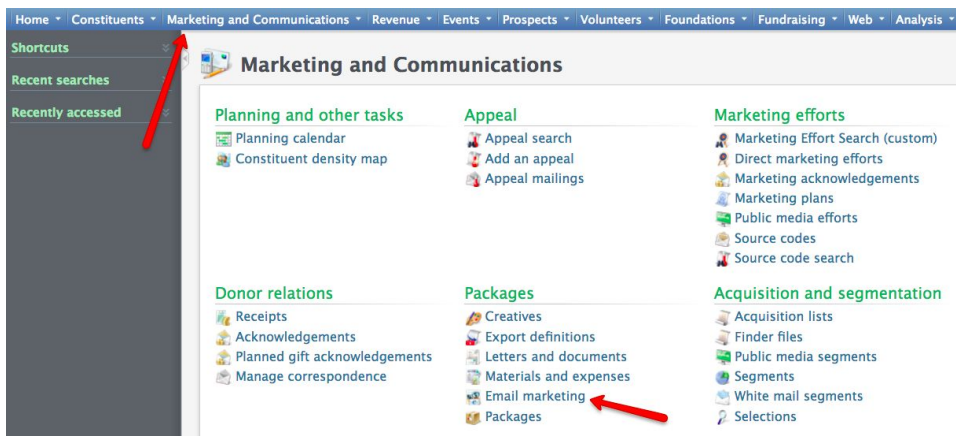
Help Save Cancel

**Important Note:** After clicking save, you may see a pop-up window for a *Duplicate Segment Check*. Confirm that all of the duplicate codes say **No**, then click **Ignore**. If a duplicate code says **Yes**, you will need to click **Cancel** and change your 10-digit code. **Most of the time, you will not see this screen when completing Step 2.**

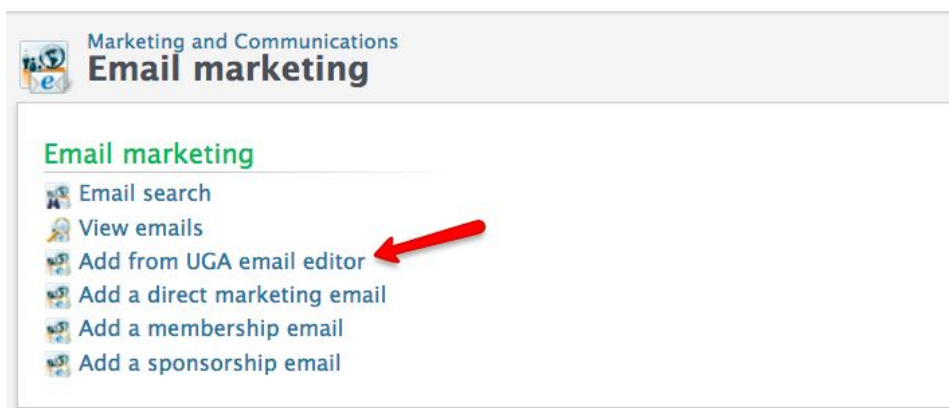


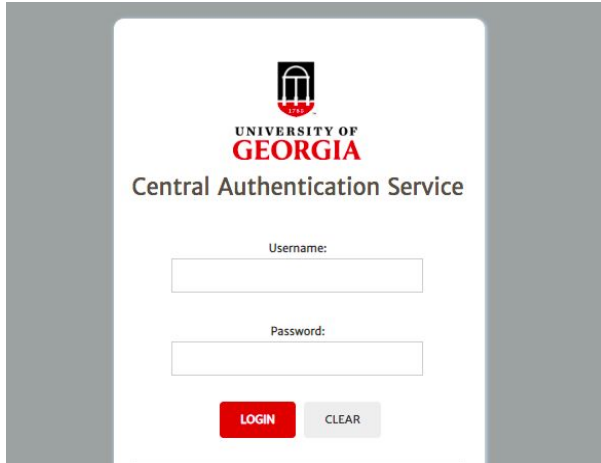
### Step 3. Create the Email

To create a new email, navigate to the *Marketing and Communications* functional area and click **Email Marketing**.

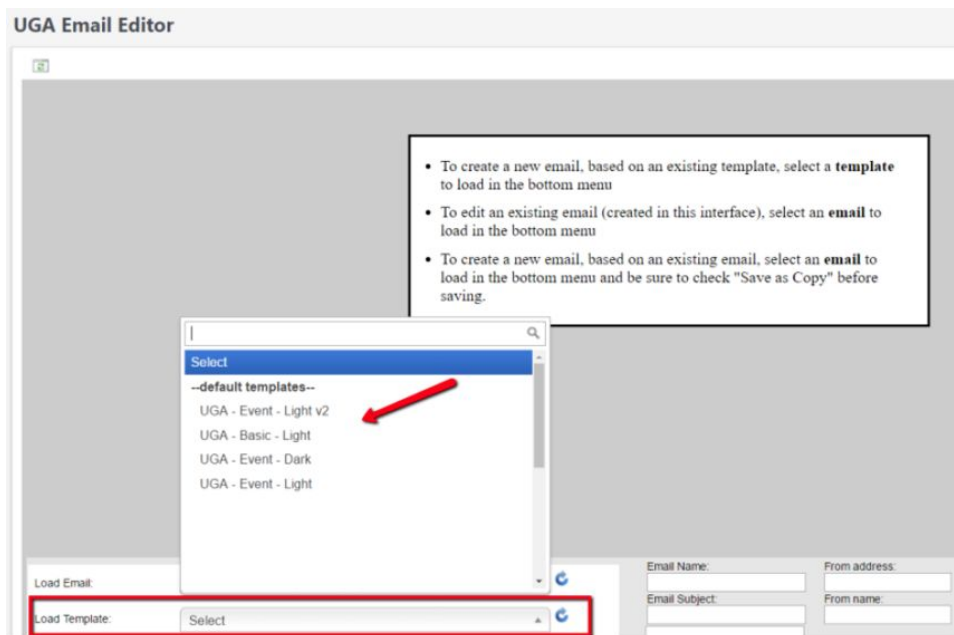


On the next page, click **Add from UGA Email Editor** and sign-in to CAS using your UGA myid.





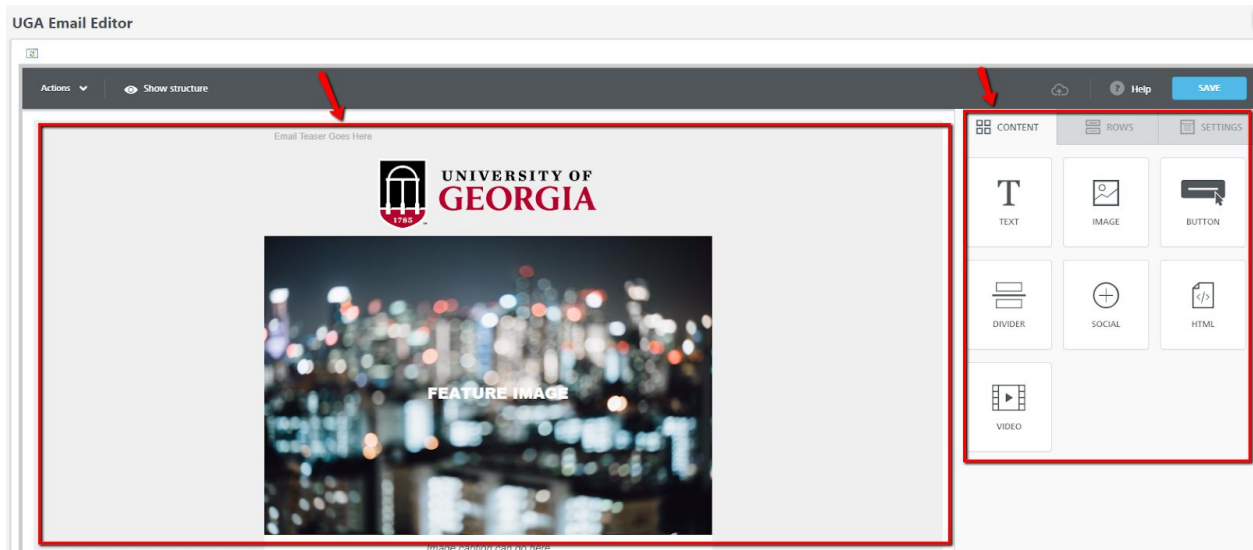
Click on the *Load Template* drop down menu to select one of the default templates.



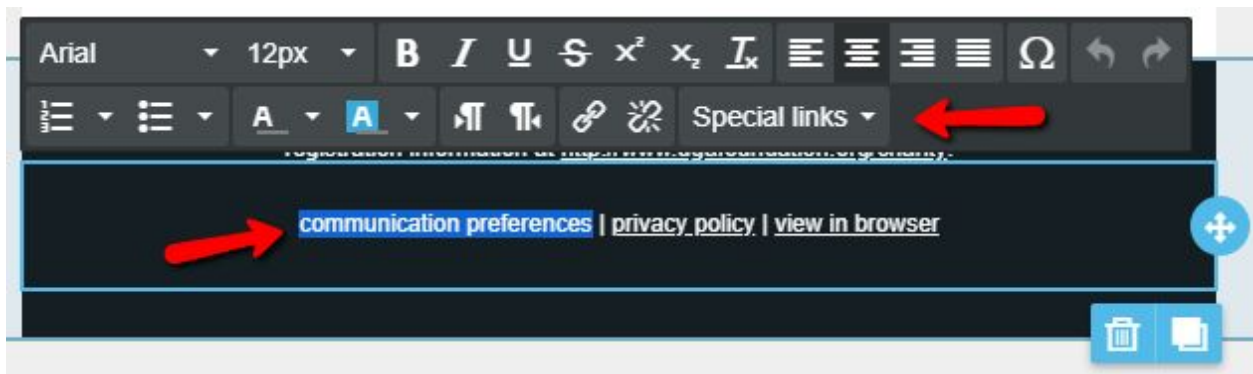
Click into the content blocks provided in the template to customize your email.

**Important Note:** If you need assistance with adding/removing email content or making any stylistic changes, please email [askit@uga.edu](mailto:askit@uga.edu).





At the bottom of your email template, click into the content block that houses the privacy policy and highlight the words *Communication Preferences*. Click on the *Special Links* tab and choose the communication preference specific to your school/college/unit.



**Email Name:** Your email name is for internal purposes only. You will always begin your email name with your naming convention.

**Email Subject:** This is the subject line that the recipient of the email will see in their inbox.

**From Address:** This is the email address that the recipient of the email will see in their inbox.

**From Name:** This is the sender name that the recipient of the email will see in their inbox.

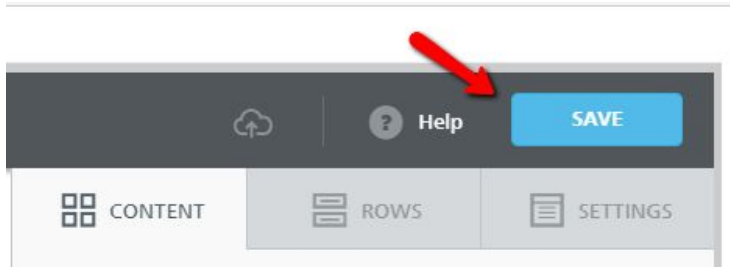
**Reply Address:** The reply address will be what the email recipient sends to when they reply back to your email. This email address should be one that is actively monitored.

**Send Failures To:** You will always send failed emails to **records@uga.edu**.



Email Name: TCOB - 2018 Fall Newslette	From address: terry@uga.edu	Reply address: lkwest@uga.edu
Email Subject: Check out what's happenin	From name: UGA Terry College of	Send failures to: records@uga.edu

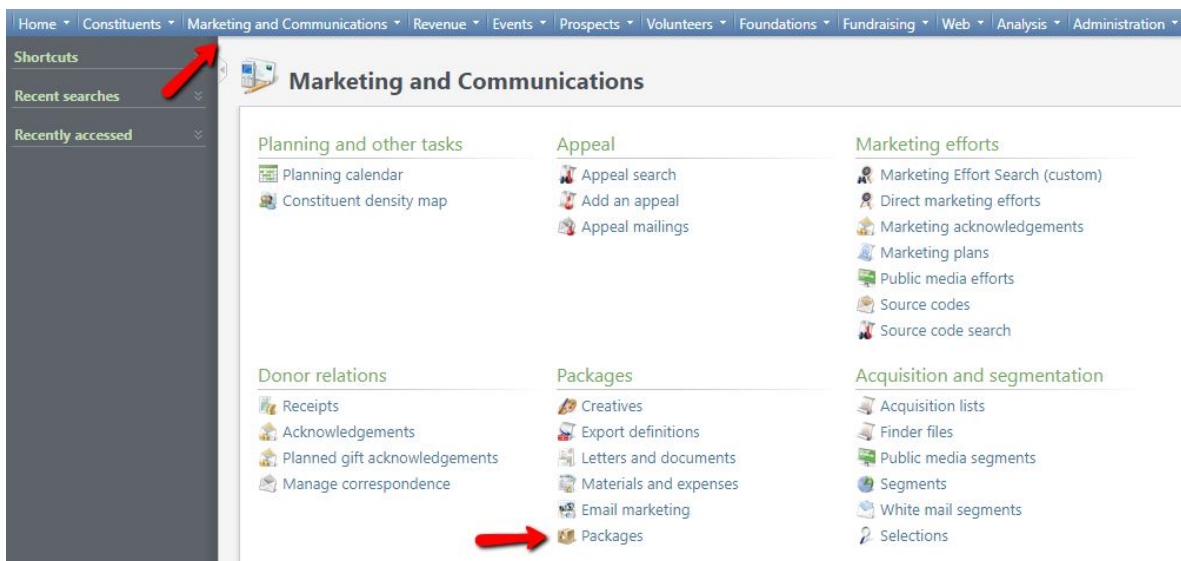
Click the blue **Save** button when you are finished.



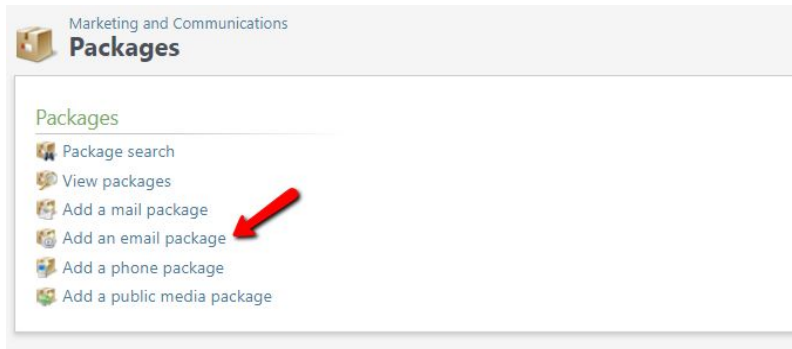
**Important Note:** After clicking Save, a pop-up notification will appear confirming that your email has been saved. If the email has not been correctly saved, the notification will display an error message. If you are unsure how to resolve the error, please contact [askit@uga.edu](mailto:askit@uga.edu).

#### Step 4. Create the Package (A package is the container that holds your email.)

To create a package that corresponds with your newly created email, navigate to the marketing and communications functional area and click **Packages**.



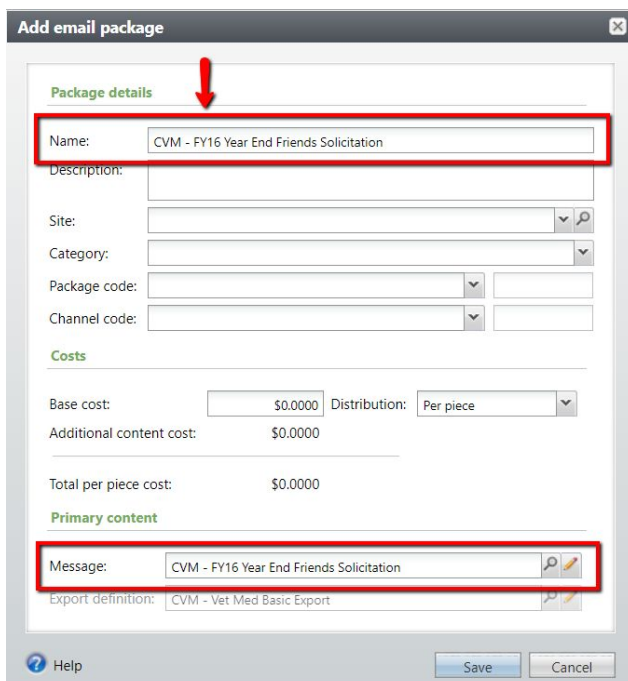
Choose *add an email package*.



When the new pop-up window appears, click into the *Message* field and search for and select the name of the email you already created in GAIL.



Next, name your package. Your package name should match the Message name.



Enter a brief description that defines your email. Then, choose your school/college/unit from the *Site* drop-down menu. For the *Category*, you will always choose **School/Unit**.

**Package details**

Name: CVM - FY16 Year End Friends Solicitation

Description: Email solicitation to send to friends of Vet Med

Site: Veterinary Medicine

Category: School/Unit

Package code: [dropdown]

Channel code: [dropdown]

In the *Package Code* drop-down menu, select **Package**. This will generate a random 3-letter code. Then, click into the *Channel Code* drop-down menu and select **Email**.

**Package details**

Name: CVM - FY16 Year End Friends Solicitation

Description: Email solicitation to send to friends of Vet Med

Site: Veterinary Medicine

Category: School/Unit

Package code: Package EEZ

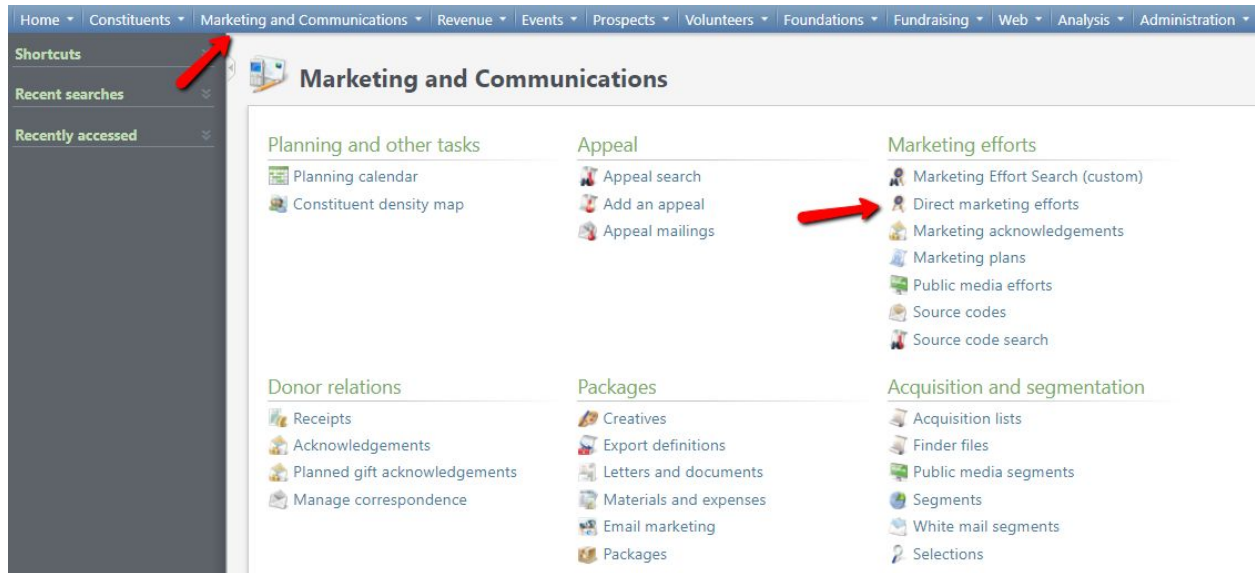
Channel code: Email E

Click **Save** when you are finished.

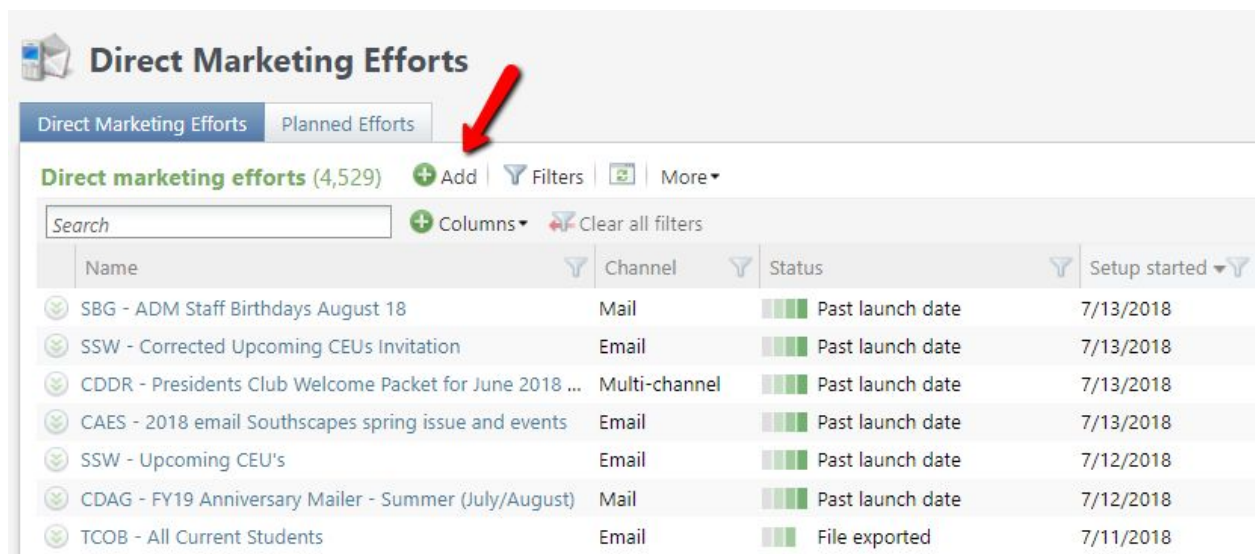
**Important Note:** Once you have completed this step, you have now anchored your email to a specific package. If you go back and edit your email in GAIL, you do **not** need to re-attach the email to your package. The package will always reflect the most updated version of your email.

**Step 5. Create the Marketing Effort** (A marketing effort is the framework that contains all the information about your specific communication.)

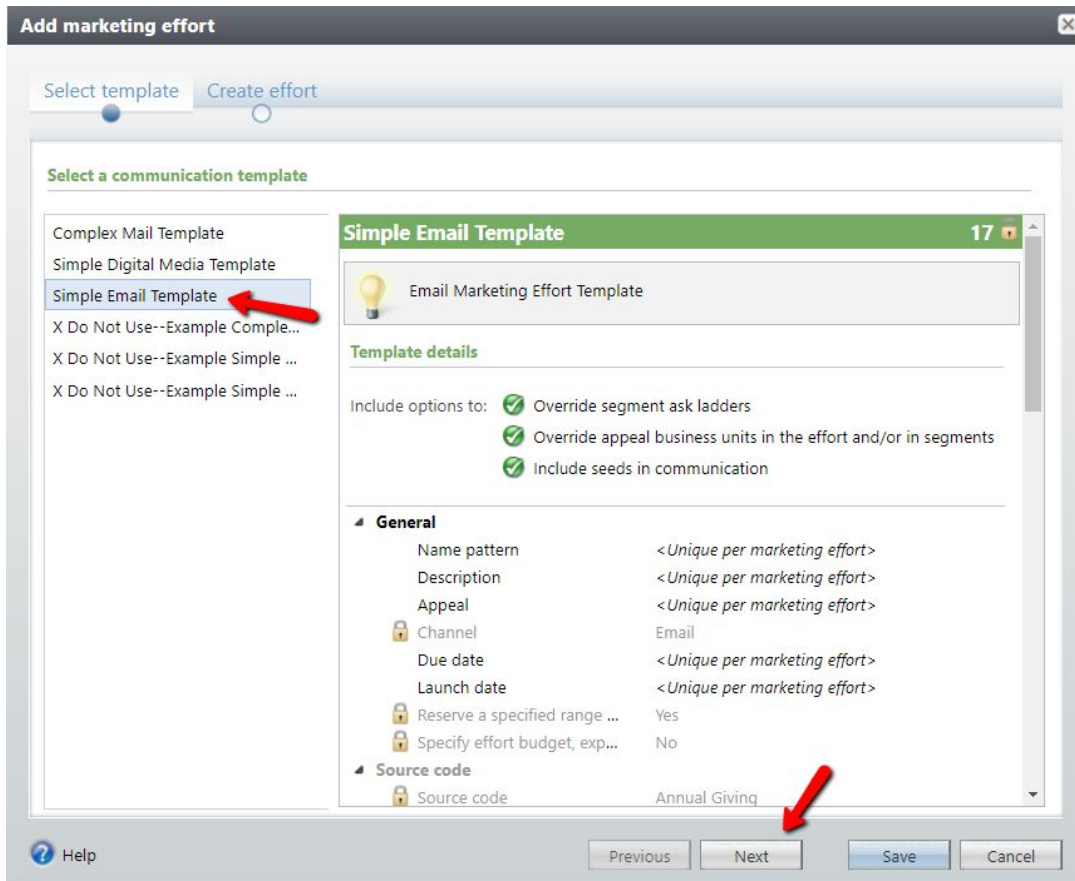
To create a new marketing effort, navigate to the marketing and communications functional area and click **Direct Marketing Efforts**.



Click the **Add** button.



Select the **Simple Email Template** and click **Next**.



**Name** your marketing effort and write a brief **Description** of your communication. (*Your effort name should match both your email and your package.*)

**General information**

Template: Simple Email Template

Name: ECOL - 2019 Spring Alumni Newsletter

Description: Email newsletter sent to all Ecology alumni

Appeal: [dropdown]

Site: [dropdown]

Due date: mm/dd/yyyy [calendar icon]

Launch date: mm/dd/yyyy [calendar icon]


Search for the name of your **Appeal** beginning with your naming convention. You should select the appeal which ends in the current fiscal year. (*Appeals are used to measure marketing efforts within a given fiscal year.*)



**General information**


Template: Simple Email Template


Name: ECOL - 2019 Spring Alumni Newsletter


Description: Email newsletter sent to all Ecology alumni

Appeal: ECOL19 

Site:  

Due date: mm/dd/yyyy 

Launch date: mm/dd/yyyy 



Choose your school/unit from the **Site** drop-down menu and set a **Due Date** and **Launch Date**.


The due date is a personal goal you set for yourself. The launch date is the day you plan on sending your email. If you're not yet sure which day your email will go out, you can set an estimated date and then correct it later.



**General information**


Template: Simple Email Template


Name: ECOL - 2019 Spring Alumni Newsletter

Description: Email newsletter sent to all Ecology alumni

Appeal: ECOL19 

Site: Ecology  


Due date: 4/25/2019 


Launch date: 4/25/2019 

**Additional options**

For this marketing effort, include options to:

Allow the exclusion of constituents who received previous communications  
*On the Exclusions tab, choose which communications to use as exclusions for this effort*



 Help





**Step 6. Finish the Source Code** (The source code makes each marketing effort unique and helps revenue and other data find its way back to the source.)

Within your marketing effort, click on the **DME Dashboard** tab. Then, click the *Edit* button next to the **Source Code** header.

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

Overview	Status	History
Template: Simple Email Template Effort ID: 12,754      Owner: Leslie K West Appeal: PSO19      Budget: \$0.00 Due date: 9/28/2018      Expected revenue: \$0.00 Launch date: 9/28/2018      Total expenses: \$0.00 Description:	Status: Setup started Segments: 0 Packages: 0 Segment quantity: 0 Seed quantity: 0 (1 seed x 0 packages) Total quantity: 0	Setup started: 9/26/2018 Counts generated: -- File exported: -- Activated: -- Refreshed: --

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

**Source code**  

Source code part	Format	Value
Dept/Program	Academic Affairs	VA
Marketing Effort	Marketing Effort	@@##
Channel	<by package>	
Package	<by package>	
Segment	<by segment>	

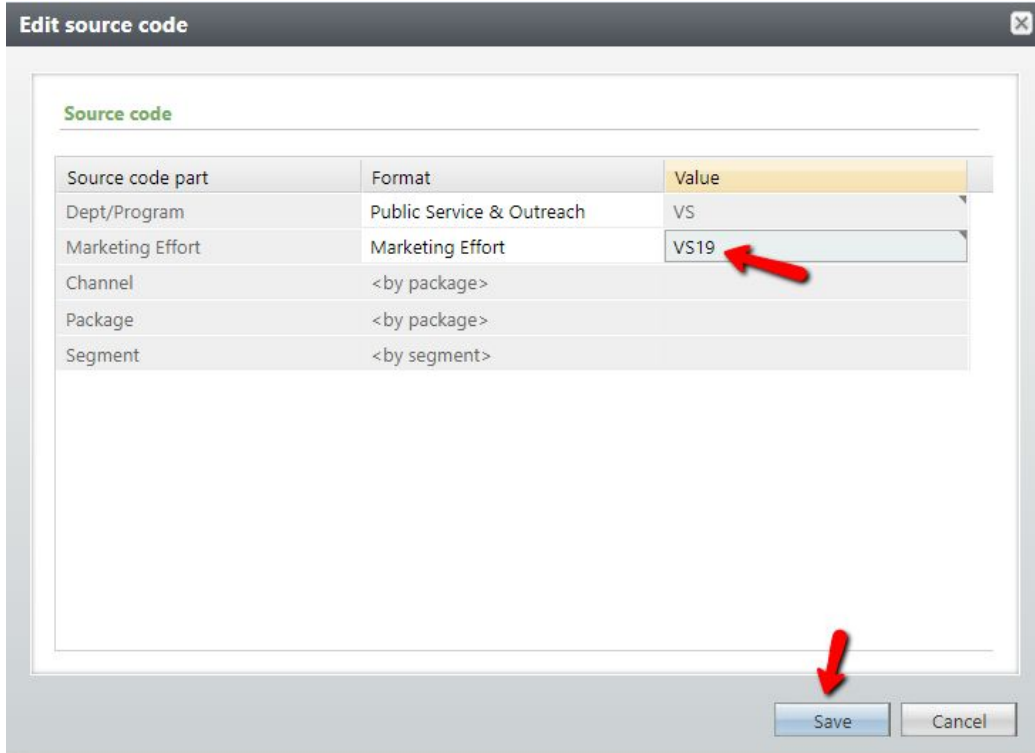
Under the Format column header, click into the box that says Academic Affairs and select your school/college/unit from the drop-down menu. (When you click out of the box, you will see your corresponding value change to reflect the new selection.)

**Source code**

Source code part	Format	Value
Dept/Program	Academic Affairs	VA
Marketing Effort	Marketing Effort	@@##
Channel	<by package>	
Package	<by package>	
Segment	<by segment>	



Next, click into the value field highlighted in yellow. Enter your **2-letter value code + the current fiscal year**. (For example, if I was from the business school and it was FY18, I would enter BU18. If I was from the law school and it was FY19, I would enter LW19.)



**Edit source code**

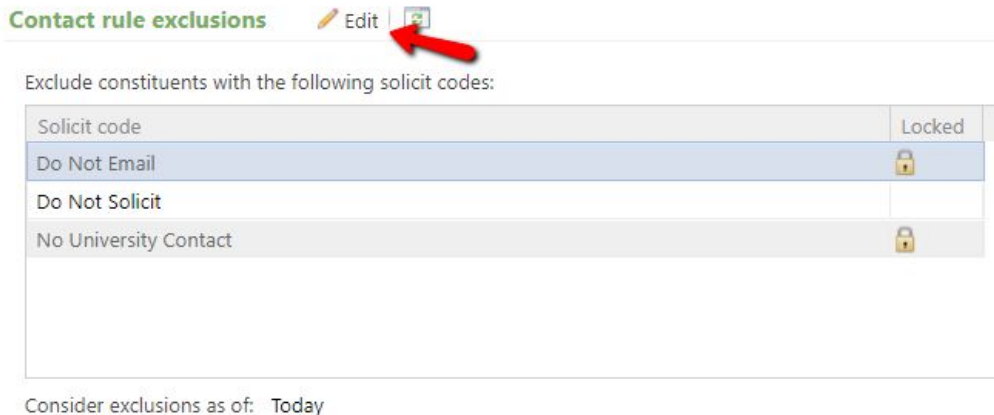
Source code

Source code part	Format	Value
Dept/Program	Public Service & Outreach	VS
Marketing Effort	Marketing Effort	VS19
Channel	<by package>	
Package	<by package>	
Segment	<by segment>	

Save Cancel

**Step 7. Add the Exclusions** (Exclusions are settings we use to remove certain constituents from our communication.)

Still within the **DME Dashboard** tab, click *Edit* next to the **Contact Rule Exclusions** header.



**Contact rule exclusions** Edit

Exclude constituents with the following solicit codes:

Solicit code	Locked
Do Not Email	
Do Not Solicit	
No University Contact	

Consider exclusions as of: Today

Click into the blank field below *No University Contact* and add the **Do Not Email specific** to your school/unit. (Ex. *Do Not Email - COE*)

Exclude constituents with the following solicit codes:

Solicit code	Locked
Do Not Email	
Do Not Solicit	
No University Contact	
*	

Consider exclusions as of: Today

Save Cancel

**Important Note:** If you are sending a solicitation communication (*meaning you are asking constituents for donations*) you will also need to add the **Do Not Solicit specific** to your school/unit.

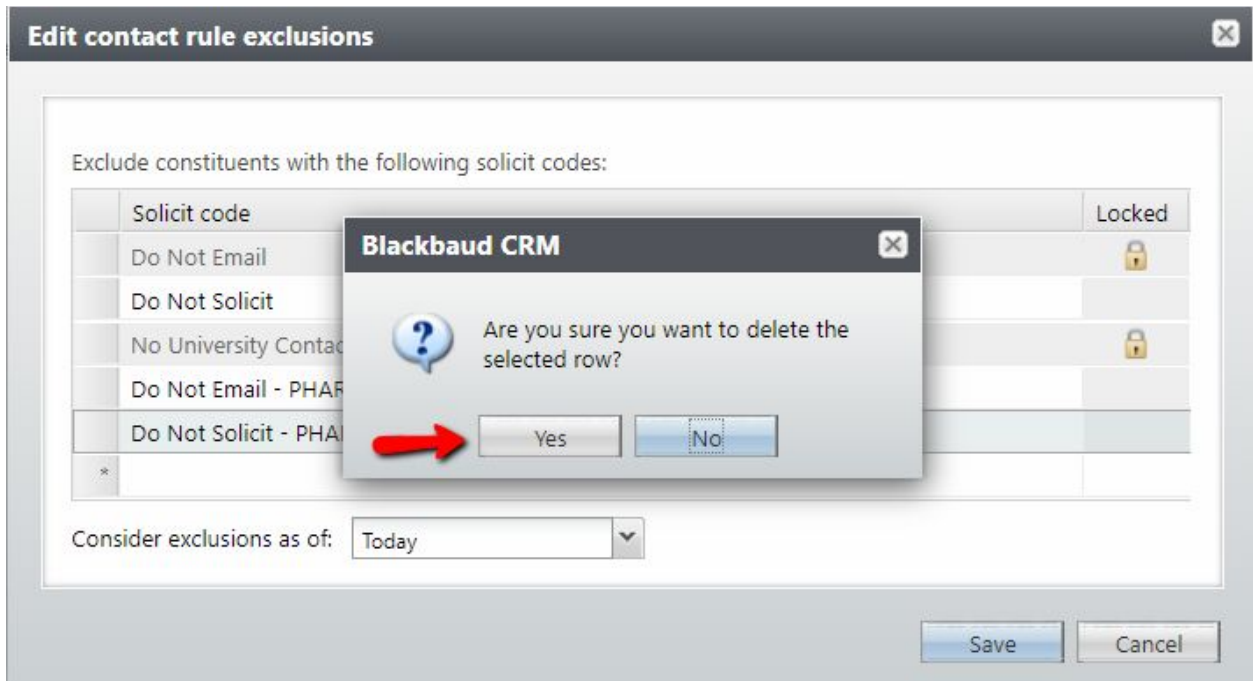
Exclude constituents with the following solicit codes:

Solicit code	Locked
Do Not Email	
Do Not Solicit	
No University Contact	
Do Not Email - PHAR - Pharmacy	
Do Not Solicit - PHAR - Pharmacy	
*	

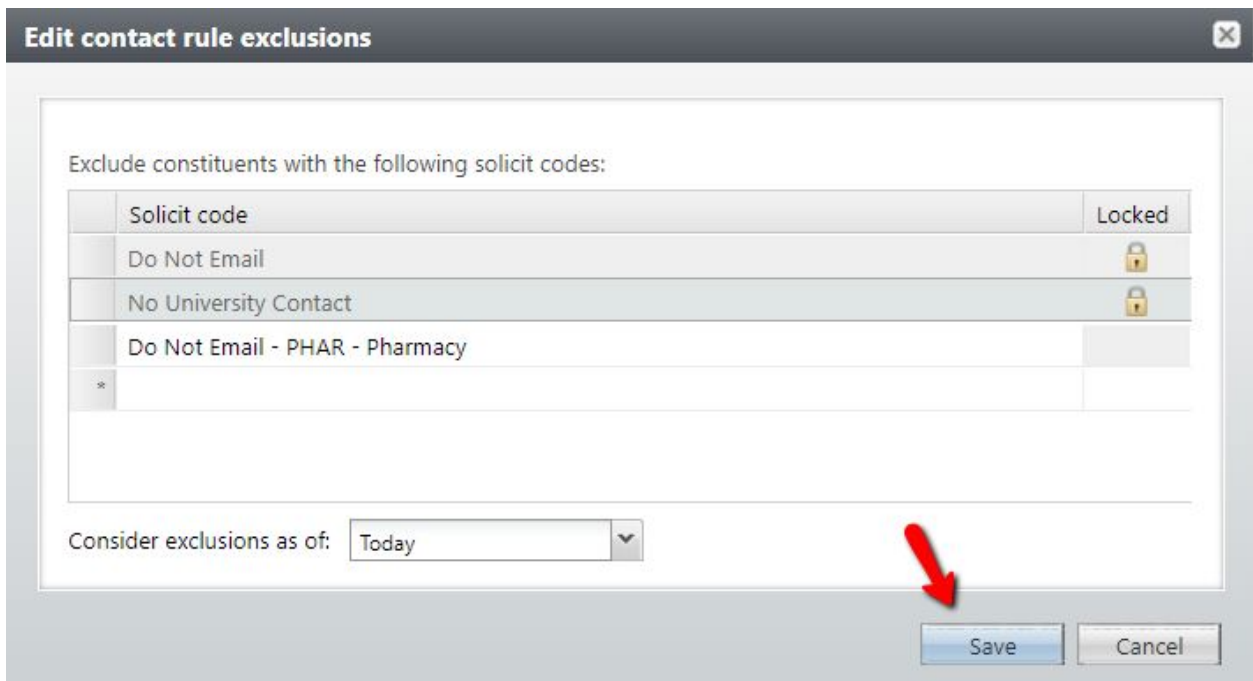
Consider exclusions as of: Today

Save Cancel

If your marketing effort is **not** a solicitation. You can remove the *Do Not Solicit* exclusions by selecting the row and pressing *Delete* on your keyboard.

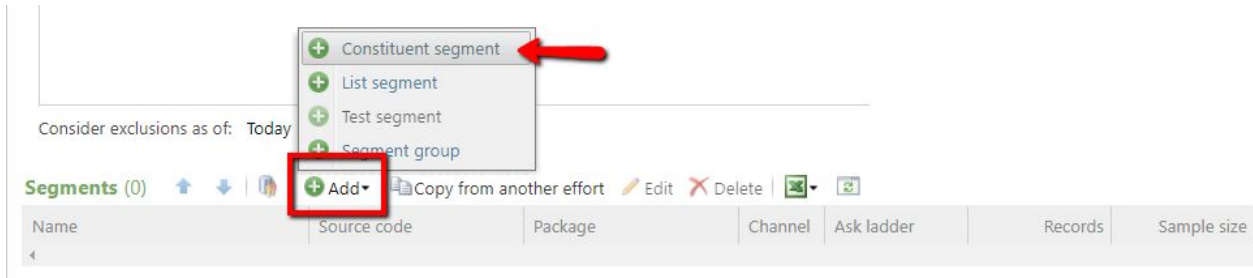


Click **Save** when you have chosen your appropriate exclusions.

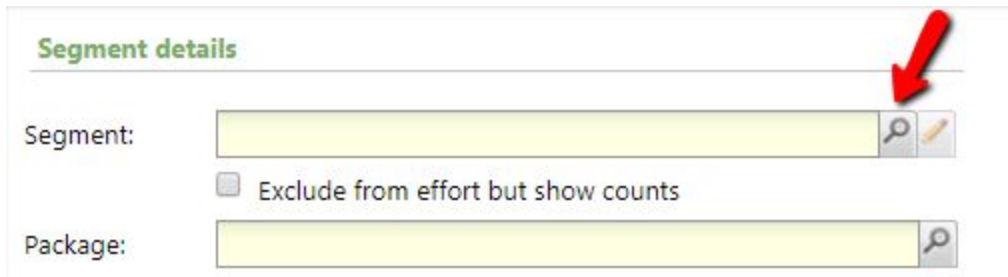


## Step 8. Tie Together Your Segment(s) & Package

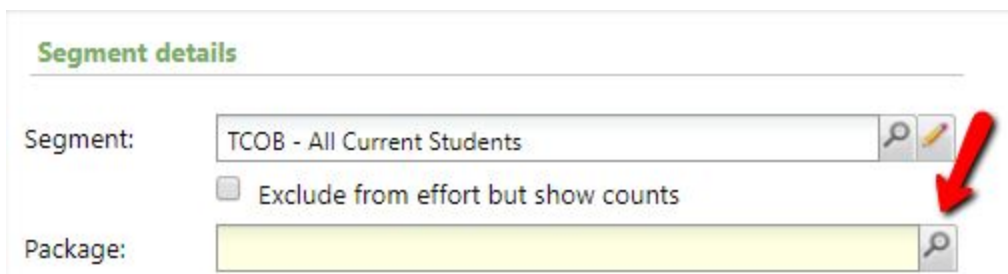
At the bottom of your *DME Dashboard*, click *Add* next to the **Segments** header. Then choose **Constituent Segment**.



Search for and select the name of your Segment. (**Remember:** Your Segment contains the list of individuals you want to reach with your communication.)



Then search for and select the name of your Package. (**Remember:** Your Package contains the email you want to send to your constituents.)



Click **Save** to connect your Segment and Package. (If you would like to add more Segments to your marketing effort, repeat **Step 8**.)

The 'Add segment' dialog box has three tabs: 'Details', 'Address Processing', and 'Source Code'. The 'Details' tab is selected. Under 'Segment details', there are fields for 'Segment' (TCOB - All Current Students), 'Package' (TCOB - 2018 August Newsletter), 'Source code' (VSVS19EEEBTCOBALLSTU), and 'Ask ladder'. There is a checkbox for 'Exclude from effort but show counts'. Under 'Assumptions', there are fields for 'Response rate' (5.00%), 'Gift amount' (\$0.00), and 'Sample size' (100). There are also radio buttons for 'nth' and 'Random', and a checkbox for 'Exclude remaining records from the marketing effort'. At the bottom, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

**Step 9. Calculate** (Calculating your marketing effort will refresh your selection(s) so that you have the most up-to-date data on your constituent list.)

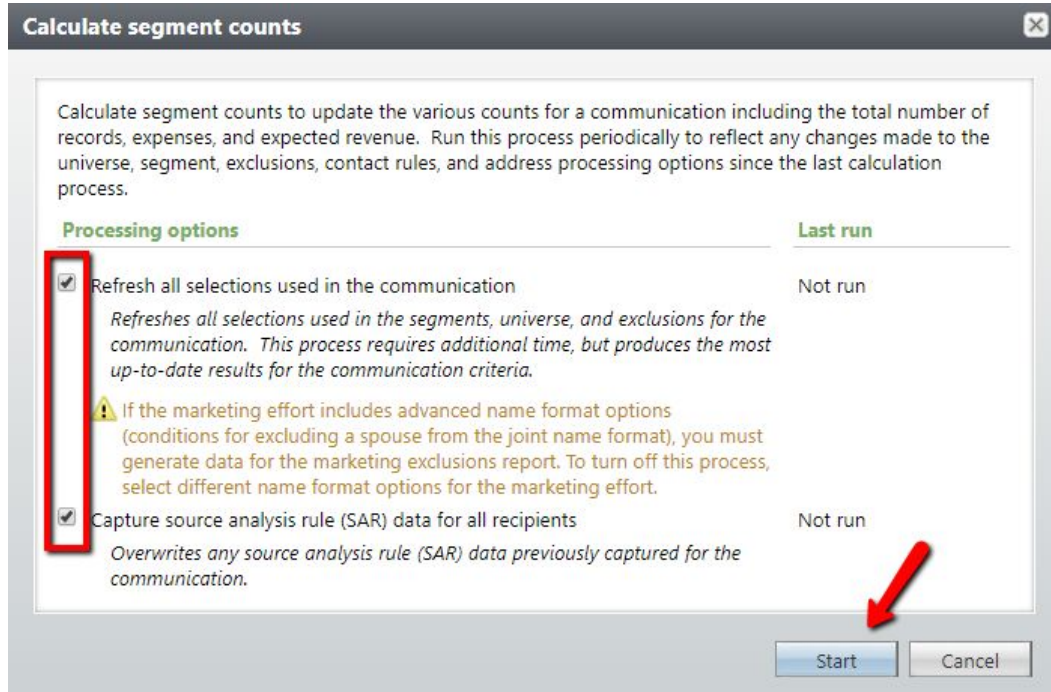
When you have completed **Steps 1-8**, you can calculate your marketing effort. Click on *Calculate Segment Counts* at the top-left corner of the page.

The screenshot shows the 'Direct Marketing Efforts' page for 'PSO - Leslie's Marketing Effort'. The 'Tasks' sidebar on the left has a red arrow pointing to 'Calculate segment counts'. The main area shows an 'Overview' section with details about the marketing effort.

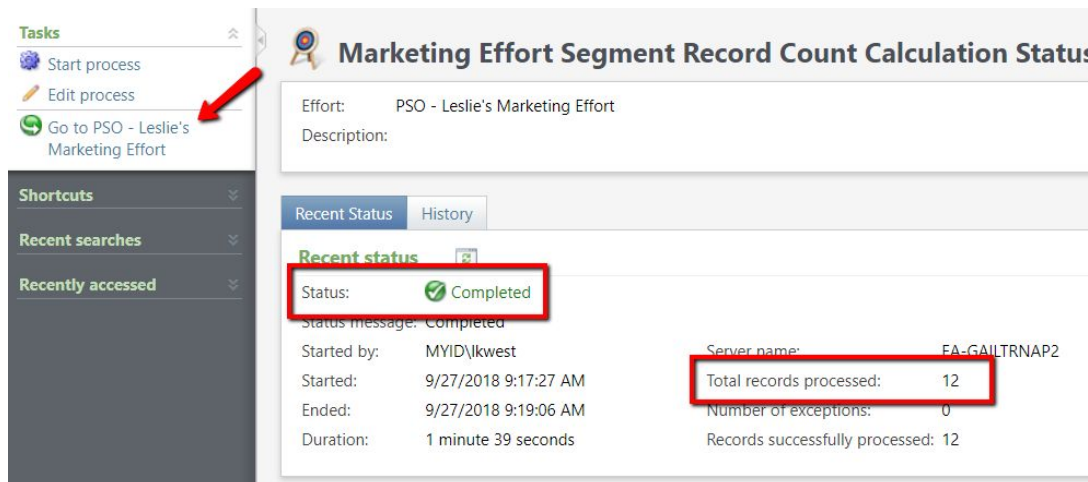
Overview		Status	
Template:	Simple Email Template	Status:	Setup started
Effort ID:	12,754	Owner:	Leslie K West
Appeal:	PSO19	Budget:	\$0.00
Due date:	9/28/2018	Total expenses:	--
Launch date:	9/28/2018	Expected revenue:	--
Description:		Segments:	1
		Packages:	1
		Segment quantity:	--
		Seed quantity: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

At the bottom, there are tabs for 'Summary', 'Segments', 'Universe', 'Exclusions', 'Effort Settings', 'Basic Information', 'Revenue', and 'Revenue Pivot Table'.

When the new window appears, make sure both processing options boxes are checked. Then click **start**.



After the process is complete you will see the number of counted records. To return to your marketing effort, click the green “Go to” link in the top-left corner of the page.

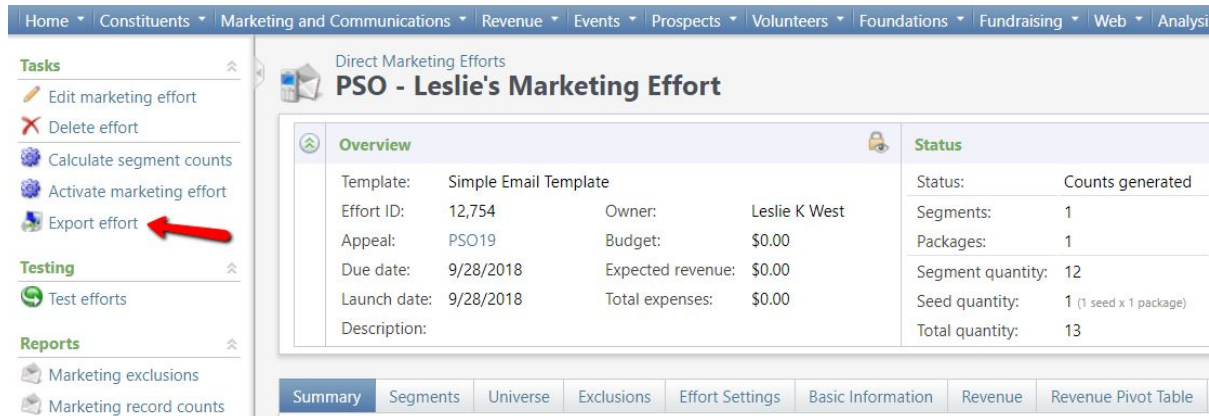


**Important Note:** If you go back to **Steps 7 or 8** and make additional changes, you will need to completed **Step 9** again and re-calculate your marketing effort.



## Step 10. Export & Send

In order to send your email, you must export your marketing effort by clicking **Export Effort** in the top-left corner of your screen.

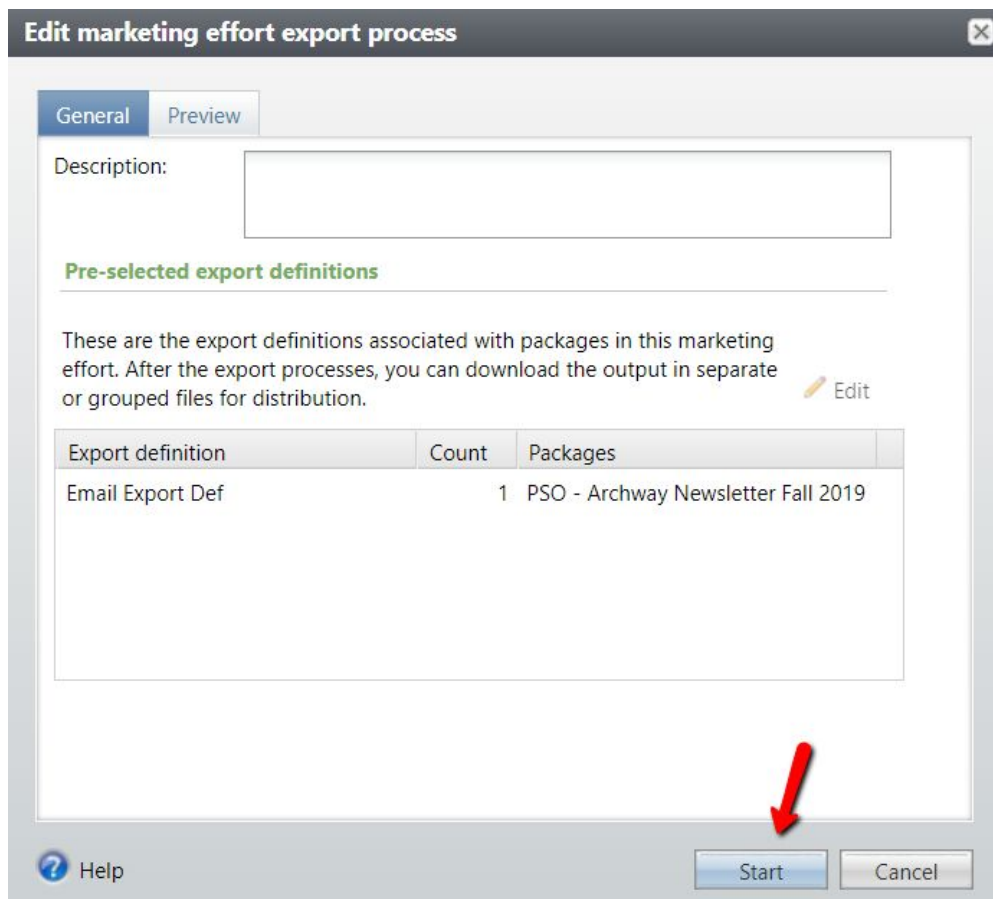


The screenshot shows the CRM interface for 'Direct Marketing Efforts'. The left sidebar contains a 'Tasks' section with the following items: 'Edit marketing effort', 'Delete effort', 'Calculate segment counts', 'Activate marketing effort', and 'Export effort'. A red arrow points to the 'Export effort' button. The main content area displays details for 'PSO - Leslie's Marketing Effort'.

Overview		Status	
Template:	Simple Email Template	Status:	Counts generated
Effort ID:	12,754	Owner:	Leslie K West
Appeal:	PSO19	Budget:	\$0.00
Due date:	9/28/2018	Expected revenue:	\$0.00
Launch date:	9/28/2018	Total expenses:	\$0.00
Description:			


At the bottom of the main content area, there is a navigation bar with the following tabs: Summary, Segments, Universe, Exclusions, Effort Settings, Basic Information, Revenue, and Revenue Pivot Table.

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



The screenshot shows a dialog box titled 'Edit marketing effort export process'. It has two tabs: 'General' and 'Preview'. The 'General' tab is active. The dialog contains a 'Description:' field, a section for 'Pre-selected export definitions', and a table of export definitions. At the bottom, there are 'Start' and 'Cancel' buttons. A red arrow points to the 'Start' button.

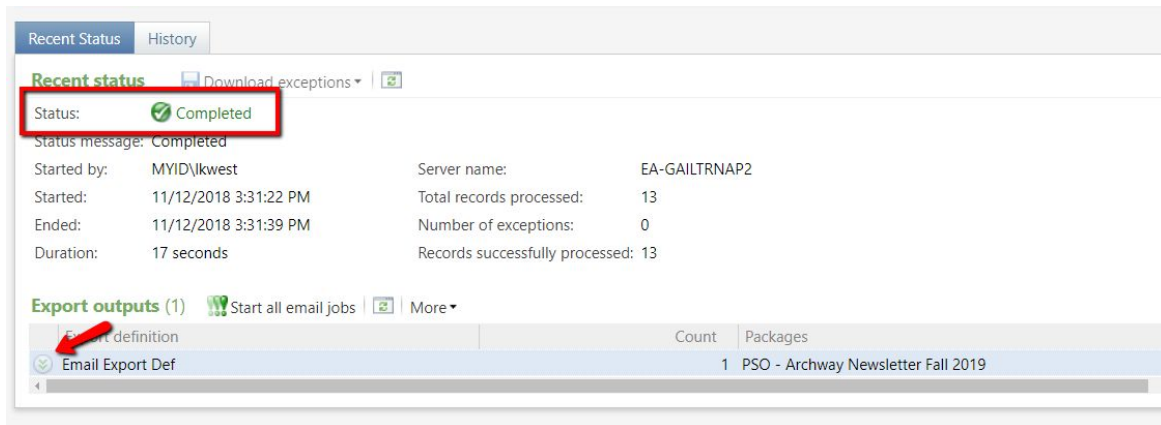
**Pre-selected export definitions**

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



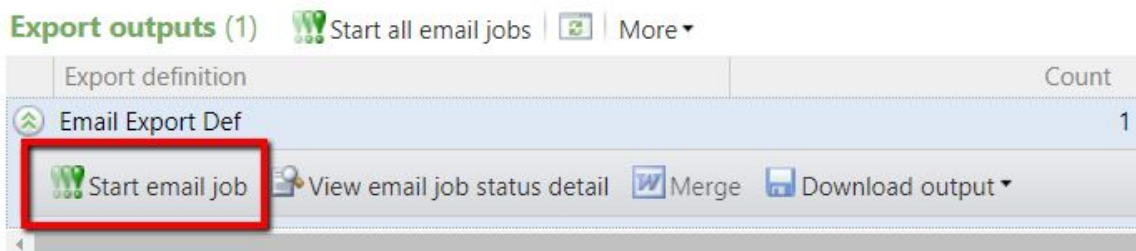
When the export process is complete, click the drop-down arrow next to **Email Export Def**.



The screenshot shows the 'Recent Status' window with a 'Completed' status. Below the status, there are details for the export job, including the server name, start and end times, and the number of records processed. At the bottom, there is a table of 'Export outputs' with one entry: 'Email Export Def' with a count of 1 and a package name 'PSO - Archway Newsletter Fall 2019'. A red arrow points to the drop-down arrow next to 'Email Export Def'.

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

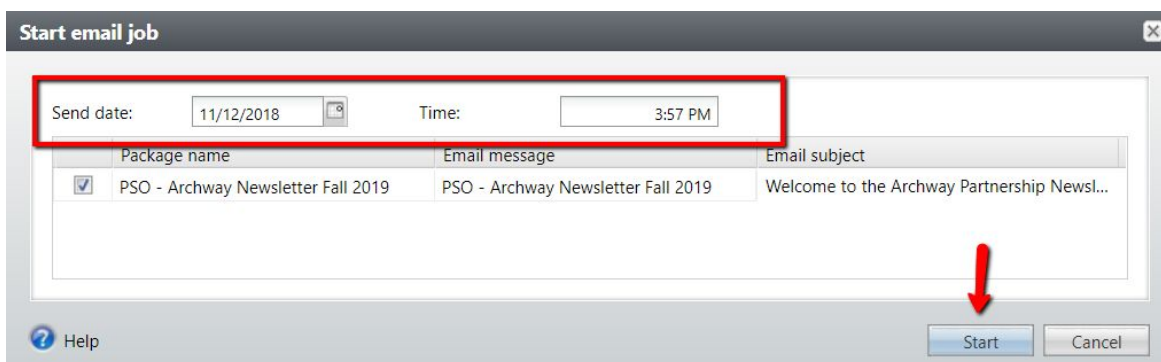
Choose the option **Start Email Job**.



The screenshot shows the 'Export outputs' table with the 'Start email job' option highlighted in a red box. The table has columns for 'Export definition', 'Count', and 'Packages'. The 'Start email job' option is located below the table row for 'Email Export Def'.

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

When the new window appears, confirm the send date and time. (You can pre-program these options to send the email at a future time.) Click **Start** to send the email.



The screenshot shows the 'Start email job' dialog box. It has fields for 'Send date' (11/12/2018) and 'Time' (3:57 PM), both highlighted in a red box. Below these fields is a table with columns for 'Package name', 'Email message', and 'Email subject'. The table has one row with a checked checkbox, 'PSO - Archway Newsletter Fall 2019', 'PSO - Archway Newsletter Fall 2019', and 'Welcome to the Archway Partnership Newsl...'. At the bottom right, there are 'Start' and 'Cancel' buttons. A red arrow points to the 'Start' button.

Package name	Email message	Email subject
<input checked="" type="checkbox"/> PSO - Archway Newsletter Fall 2019	PSO - Archway Newsletter Fall 2019	Welcome to the Archway Partnership Newsl...

**Important Note:** Once you click start, the email will be sent to the Blackbaud server. We won't be able to "un-send" the email, so please make sure you have carefully reviewed your email.

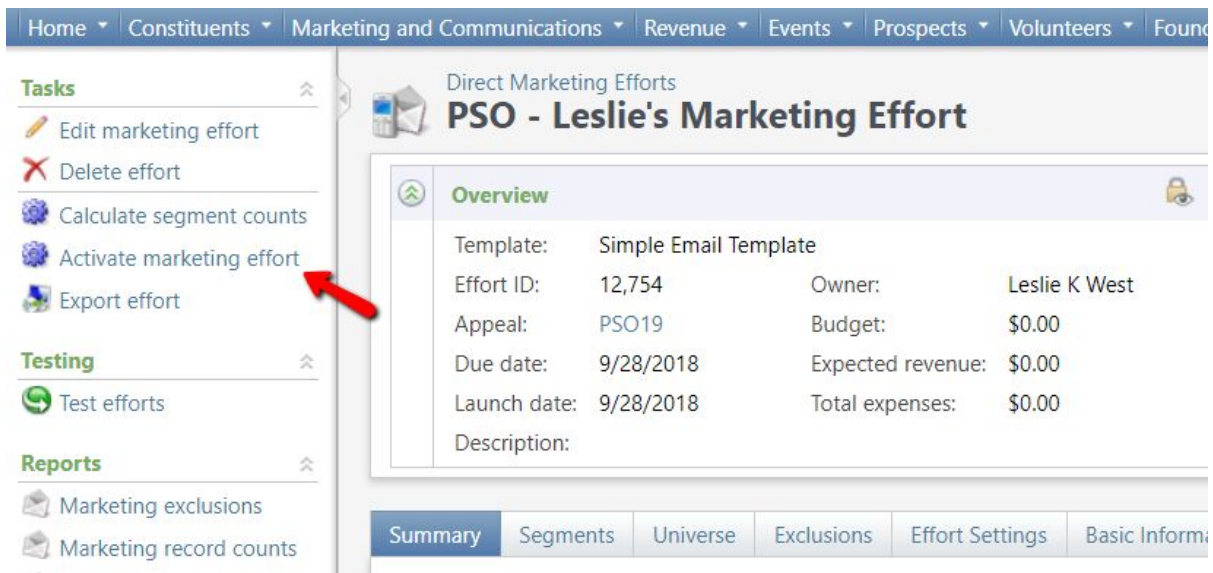
To return to your marketing effort, click the green “Go to” link in the top-left corner of the page.



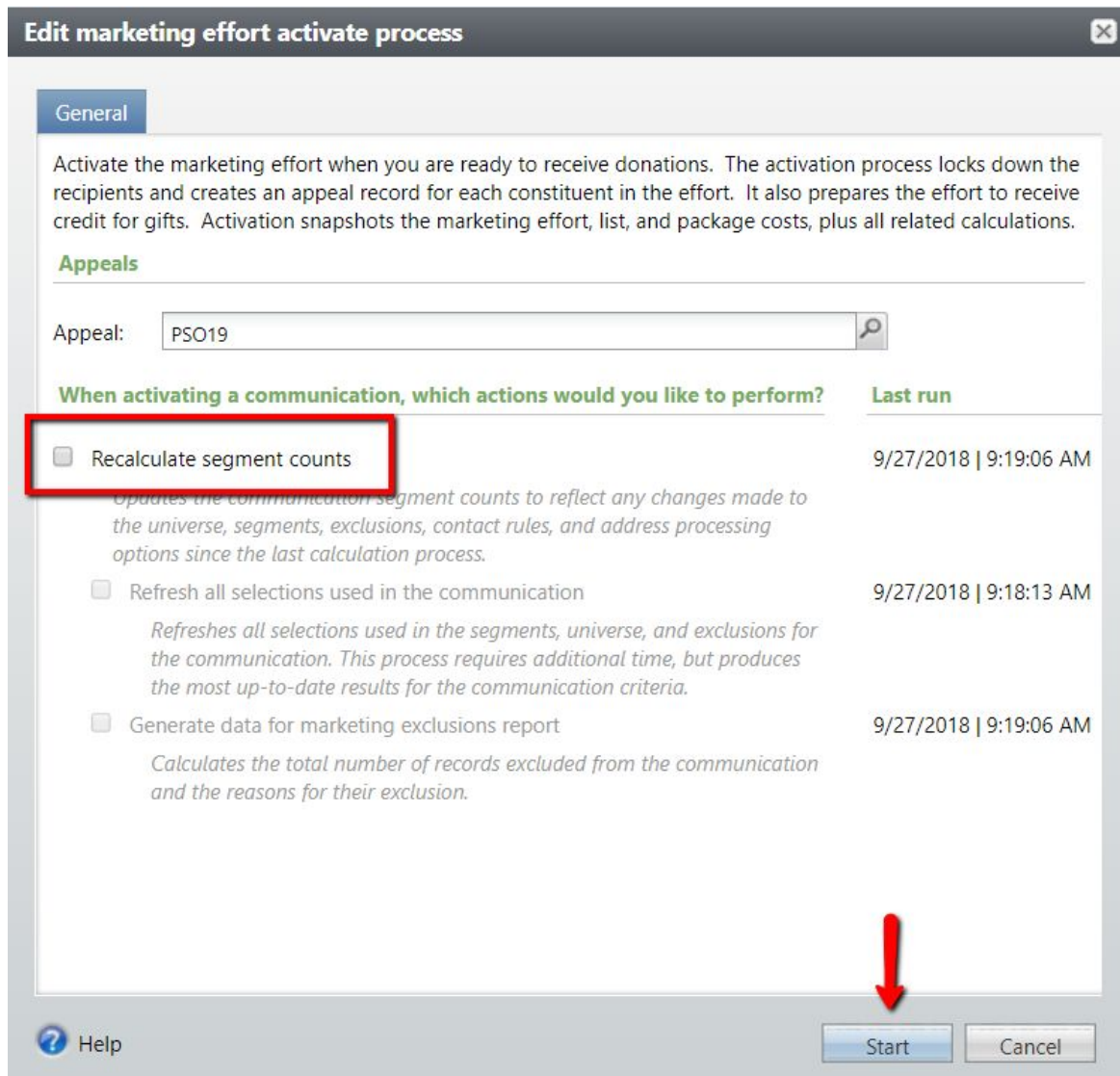
### Step 11. Activate (This is the last step!!)

Activating your marketing effort signals to GAIL that the effort is live. GAIL will tag all the constituents' records with the communication and it will open the effort up to start receiving any donated revenue.

To activate your effort, click **Activate Marketing Effort** in the top left corner of the screen.



When the new window appears, make sure your *Recalculate* box is unchecked, then click **Start**.



**Important Note:** Once you click start and activate your marketing effort, you will not be able to make any further changes to your effort. Activating your effort is similar to a permanent save.

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