



THANKVIEW TRAINING AND USER GUIDE

Introduction

ThankView allows stewardship coordinators and other campus stakeholders to send personalized thank you videos and other video communications showing donors and friends of UGA the direct impact of their giving and support. This could be a scholarship recipient expressing their gratitude to their specific donor or a travel abroad student standing in a small village in Latin America talking about the impact their trip is having on their life. Videos can also be sent to groups of constituents like scholarship donors to a specific scholarship allocation.

Guidelines

ThankView has both a comprehensive FAQ search page and a Walkthrough User Guide

ThankView FAQ's and the Walkthrough can be found on the ThankView site under "My Account" (First initial of your name inside of a circle) > "FAQ's" or "walkthrough" after logging in to your dashboard.

Welcome Campaigns Contacts Lists Video Library Metrics **L**

- Notifications >
- Switch Portals >
- Settings
- Walkthrough
- FAQs
- Sign Out

ThankView Walkthrough
Video: 9m 30s

01. Creating a Campaign	1m 23s
02. Adding Recipients	0m 51s
03. Email Settings	0m 56s
04. Landing Page Settings	1m 03s
05. Video - Intro Themes	0m 36s
06. Video - Webcam, Upload, Library	0m 41s
07. Video - Thumbnail & Trim Video	0m 13s

Got questions? Get answers at our FAQs.

Each unit utilizing ThankView will have

- Trainings through ThankView
- a "creator" and "recorder" log-in (recorder login can be shared with other staff members)
 - Creators can create, design, add recipients, record, and send ThankViews
 - Recorders only have access to record ThankViews
- the ability to create and manage their own campaigns (within guidelines); and
- the ability to customize email fields such as the "From", "Name", and "Subject" of each campaign

Each unit is responsible for the items below

- Notifying Donor Relations of Creator/Recorder email or staff changes. If the ThankView Creator or Recorder leaves the department or a different Creator or Recorder is determined, the admin must contact [Lauren Schlesinger](#) or [Abby Bryant](#) to transfer the login to a new email address.
- Uploading their contact list into ThankView. Please work with AskIT to for any data needs.

Contacts

Every contact that is uploaded to ThankView lives in the Contact page. Think of this as if it were the GAIL database. Any change you make to the "record" of your contact, i.e. Mr. John Doe, in ThankView will impact any future sends to your contact, i.e. Mr. Doe.

It is extremely important that all users use the following fields exactly how they are shown:

Title	Name	Last Name	Email	Preferred Name	Donor ID	Joint Salutation	Joint Name	Joint First Name
Mr.	John	Doe	jdoe@gmail.com	Mr. John J. Doe	12345	Mr. and Mrs. Doe	Mr. and Mrs. John J. Doe	John and Jill
Ms.	Jane	Fawn	fawn@uga.edu	Ms. Jane Fawn	23456	Ms. Fawn	Ms. Jane Fawn	Jane
Dr.	Walter	Bear	docbear@bellsouth.net	Dr. Walter Bear	5678	Dr. and Mrs. Bear	Dr. and Mrs. Walter Bear	Walter and Wendy
Mrs.	Kate	Byrd	kateb2gmail.com	Mrs. Kate Byrd	75897	Mr. Byrd and Mrs. Byrd	Mr. Tracy Byrd and Mrs. Kate Byrd	Tracy and Kate
Mr.	Tommy	Cat	tcat@gmail.com	Mr. Thomas Cat	54897	Mr. Cat and Ms. Fox	Mr. Tommy Cat and Ms. Joan Fox	Tommy and Joan
Ms.	Joan	Fox	jfox@gmail.com	Ms. Joan C. Fox	290087	Mr. Cat and Ms. Fox	Mr. Tommy Cat and Ms. Joan Fox	Tommy and Joan
Dr.	Mickey	Mouse	hotdiggitydr@bellsouth.net	Dr. Michael J. Mouse	3865	Drs. Mouse	Dr. Michael J. Mouse and Dr. Minnie Mouse	Mickey and Minnie
Dr.	J.D.	Dorian	drdorian@piedmont.org	Dr. John Michael Dorian	15589	Dr. Dorian and Dr. Reid	Dr. John Michael Dorian and Dr. Elliot Reid	J.D. and Elliot
	Small Business, Inc.		smallbizinc@gmail.com	Small Business, Inc.	900827	Small Business, Inc.	Small Business, Inc.	Small Business, Inc.

Preset Fields and Custom Fields

ThankView uses the following fields for contact info as other useful information that can be used to customize your ThankView mailings

- Preset Fields that need to be used exactly how we are detailing in this user guide
 - Title – only use a single title, i.e. Mr.
 - First Name – only use your contact’s first name, i.e. John
 - Last Name – only use your contact’s last name, i.e. Doe
 - Email/Cell Phone # - To send as a text, you will need to create a duplicate contact but add the contact’s cell # instead of their email
 - Preferred Name – only use your contact’s preferred full name, i.e. Mr. John J. Doe
 - Donor ID – Only use for your contact’s GAIL ID.
 - If your contact is not coming from GAIL/not in GAIL, no ID is needed.
 - All contacts uploaded from GAIL should have their ID included
- Preset Fields that can be used for other data customization
 - Company
 - Ask Amount
 - Last Donation
 - Designation
 - Class Year
 - Years Giving
 - Notes

If using these fields, always check your data to confirm it is the data you want to display when your ThankView is sent

- Custom Fields – need to be used exactly how we are detailing in this user guide
 - Joint Salutation – use your contact’s joint name, i.e. Mr. and Mrs. Doe
 - if your contact doesn’t have a joint name in GAIL, copy over the single Title and Last Name to this field. This will allow you to send your ThankView to both those with a joint name and a single name.
 - Joint Name – use your contact’s full joint name, i.e. Mr. and Mrs. John J. Doe.
 - Again, if your contact doesn’t have a joint full name, copy over the Single Preferred Name to this column. This will allow you to send your ThankView to both those with a Joint Name and Single Preferred Name.
 - Joint First Name – use your contact’s joint first names, i.e. John and jane.
 - if your contact doesn’t have joint first names, copy over the Single First Name to this column. This will allow you to send your ThankView to both those with a Joint First Name and Single First Name.
 - Custom Field #4 – TBD
 - Custom Field #5 – TBD
- Please refer to the [ThankView Contact Data Template](#) for formatting your list appropriately

Lists

- We are asking that everyone creates a list for every contact upload, even if it is for a single contact. This will help keep things organized and allow us to quickly fix any issues that come up with contacts.
- Please label your contact list with the same name as your campaign that will utilize the contact list

ThankView Campaign setup

Types of Campaigns that can be used:

- Thank You
- Event Related
- Updates
- Birthdays
- Gift Anniversaries
- Video Request

**We are not allowing anyone to use the Appeals/Solicitations Campaign option for ThankView through the shared ThankView account. If your area is interested in using ThankView for solicitations, you would need to purchase your own ThankView license.*

Be sure to use the following naming conventions when naming your campaigns in ThankView

- GAIL Unit Code – Campaign Name
- CDDR – Scholarship Student Thank You 4.24.2020
- By using this naming convention, you can easily search for anything with your unit name and filter out all other unit campaigns

Email Settings

- You can use either Envelope Format, Animated Format, or Thumbnail format
- Update your **Subject Line**
 - It is recommended to use **video** and your specific area's name in the subject line, so recipients know exactly what they are getting and who it is from
 - You can use merge fields to customize this with data from your contact list
- Choose your **Font**
 - Default is set to Minion
- Update your **Email Message**
 - You can use merge fields to customize this with data from your contact list
- Always update the **Sender Name** and **Sender Email Address** fields to your area or you can use the default "University of Georgia"
- Update your **Reply To** field to your specific email
- Always update your **Share Title**, **Share Message**, and **SMS Response (when sending as a text)** if you are going to allow people to share their ThankView video

Landing Page

- For **Envelope Appearance**, remember to update the text that will appear on your recipient's envelope
 - You can add text before or after the recipient's name
 - You can use merge fields to customize this with data from your contact list
 - If using a merge field that is not prepopulated in the envelope appearance box, use the empty bracket selection [] to keep other name fields from populating
 - For the front of the envelope text, you can be as formal or as informal with the recipient's name as you would like
 - If you are not wanting to use a name on your envelopes, use the empty bracket selection []
- Please only use the 6 custom UGA envelope designs when sending ThankView messages (labeled "UGA 1", "UGA 2", etc.)
- You can share a link with your recipients if applicable
 - This will show up as a button below your video
 - You can edit the button Text
 - will allow you to change the text displayed for your link
 - this will show up as a red button
- Add a description or text below your video
 - Use Merge Fields to Customize this description to each donor
 - You can preview your merge field data by clicking on the preview button
- If you do not want people to download/share their video, please disable the secondary action buttons

for downloading and sharing on the landing page setup

- If you are sharing any need-based scholarship recipient videos, please disable the downloading and sharing buttons
- Please ignore the tracking pixel – this is for social media click tracking!

Intro Theme

The following themes are preferred:

- No Theme
- Cubed
- Tryptic
- Full Frame
- Logo

Use Canva or have your designer create an image that you can plug into the Full Frame or Logo theme. For all other available themes, please use your personal judgement and update fonts to follow branding guidelines

- Georgia or Minion – substitute for Merriwether
- Open Sans – substitute for Oswald

Please use your personal judgement when choosing music to play with your intro.

- There are 5 custom Redcoat Band music files for use as intro music
 - Alma Mater
 - Battle Hymn
 - Fight Song
 - GloryGlory
 - Krypton

Videos

- Make sure your videos are uploaded to the Video Library before getting ready to send
 - This makes the setup of adding videos to your contact list much easier
- You can combine multiple videos into a single video in the video library
 - You can add fade transitions between each video
- You can add a second video to your ThankView by clicking on Add-Ons
 - You can add on a video or an overlay

Send

- Always send a test email before sending out to your list
 - You can select which recipient's email you will receive as a test
- From the send page you can monitor which ThankViews have been opened and can follow up at a later time if the first send was not opened
 - can be scheduled for a future date
 - can be sent one by one as videos are received

Communication Codes

- Adding a communications code for recipients of ThankView messages and video requests:
I am going to use the “Warnell Birthdays – Jackie Sherry” campaign as a walkthrough example:



Warnell Birthdays - Jackie Sherry

2 Recipients | Birthdays

🎥 Videos Added: 2

📧 You've Sent: 2

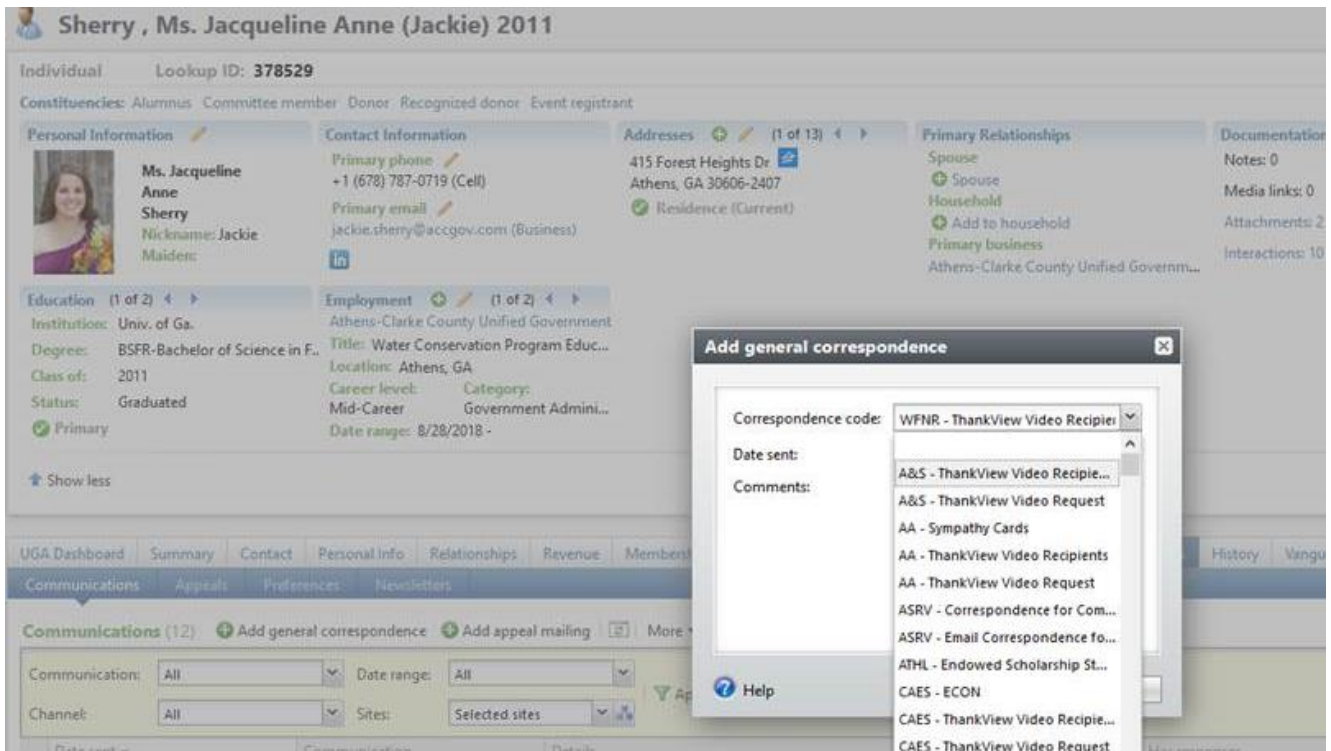
👁️ Open Rate: 100.0%

⚠️ Spam/Bounce: 0.00% / 0.0%

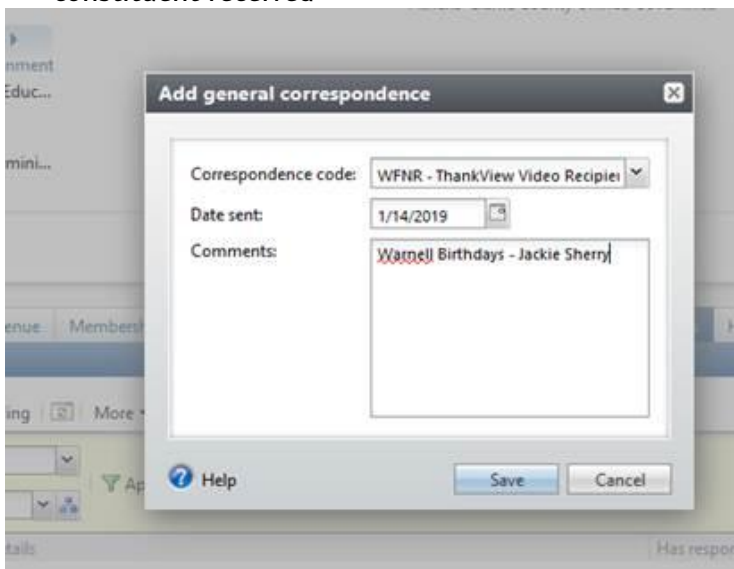
For each recipient of a video message or a video request, please add a communications code to their GAIL record:

1. Go to the communications code tab on the constituents record in GAIL and select “Add general correspondence”

2. From the drop-down Correspondence code box, select the appropriate code of either “ThankView Video Recipient” or “ThankView Video Request”
- Based on users in the ThankView system, Cindy Bond set up individual codes for each area. If your area has not been set up, please let me know and I will have her add this



3. Once you have selected the appropriate correspondence code, add the date that the ThankView video or request was sent
4. In the comments box, please add the name of the campaign from ThankView that the constituent received



Have questions or want to create strategy around your ThankView?

Contact [Lauren Schlesinger](#) or [Abby Bryant](#) in the Office of Donor Relations.

Recording an Impactful Video

Sample Video Request Wording:

Hi %first_name%!

We are asking you to record a short thank you message that will be shared with your scholarship donor.

Only for need-based scholarships, include a release link in your instructions – contact Lauren Schlesinger for assistance with custom release link:

In order to participate, please complete your scholarship information release by clicking on the following link: [Scholarship Video Message Release](#)

Videos are very easy to make – just click the button that says "Record Your Video!" at the bottom of this message and follow the instructions to record and submit your video.

Please remember to include the following in your video:

1. Your name
2. Thank your donor for their support during your time at UGA
3. Tell them about your plans for after graduation
4. Anything else you would like to share about your UGA experience

Tips and tricks for your video:

Click this [link](#) to view an example student thank you video

1. If possible, wear something red and black or a UGA shirt
2. Record your video in an area that is well-lit, not backlit (like in front of a window) and free of background noise
3. Smile!
4. Speak slowly and avoid reading from a script, if possible
5. Be sincere!
6. Ideally, videos should be about a minute to a minute and a half long

I look forward to seeing your videos! **Please submit them by DEADLINE DATE. If there is a reason you are not able to submit your video by that date, please let me know.**

Thank you so much for taking time to say thanks – your donor will appreciate hearing from you!

If you have any questions, please let me know!

sincerely,

Lauren Schlesinger

Development & Alumni Relations | Assistant Director of Scholarship Stewardship
706-542-6941 | lkschlesinger@uga.edu

FAQ's and tips for recording an impactful video

[ThankView Recording Tips & Trips Video](#)

Recording Techniques– You can record directly to ThankView with your desktop or mobile device. Here are some tips to make sure your recordings look and sound great:

- Choose a location that provides balanced lighting. Webcam/phone cameras tend to get very grainy in low light. We often suggest shooting outside or in offices with ample amounts of natural light.
- Choose a location that is not backlit.
- Avoid echo chambers. Often times sparse offices or conference rooms with glass walls can create a ton of echo. If you're recording directly into the platform via your computer or phones webcam we suggest choosing a space with good acoustics.
- Avoid blustery locations. A camera phone's mic can often make a gentle ocean breeze sound like typhoon, which will overpower your recorder's message.
- Choose a flattering angle for your recorder. At ThankView all laptops have risers so recordings are at eye level rather than from below which everyone can agree is not usually a person's best angle.
- Record in the horizontal position

What to say in your Video– The content of your video is ultimately up to you! It can be funny, sweet, informative, or whatever tone you need for your campaign. Here are some suggestions for content in your video:

- We advise always starting with gratitude, whether you're thanking, inviting, or updating your recipient. we recommend keeping the video between 30 seconds and a minute (though there are exceptions like this great example from Pepperdine– click [here](#) to watch).
- If you would like your recipient to click on the CTA button below the video, we recommend mentioning the button itself and even better, pointing to the button below.
- Choose a location or setting that creates a sense of nostalgia. This could mean shooting in front of an iconic building, in the dining halls or even during an activity your recipients will recall fondly. Please click [here](#) to see a great example from Miami University who shot thank you videos while freshman students were moving into their new dorms.

Sample ThankView videos

University of Washington	https://thankview.com/video/58e3f9ac34696/preethi-raghu?source=export	Branded Landing Page Thank You
Auburn	https://auburn.thankview.com/video/preview/58eacc156c64e	Thank You
Notre Dame	http://bit.ly/NotreDame-ThankView	Thank You
Augsburg College	http://bit.ly/ThankView-Augsburg	Thank You
Boston University	bitly.com/BU-ThankView	Thank You
Miami University	http://bit.ly/MiamiU-ThankView	Thank You
The Hill School	http://bit.ly/TheHill-ThankView	Student to Donor Thank You
USAO	https://thankview.com/video/5898c53738a7b/cary-dehart?source=export	Phone-A-Thon Thanks
Elon University	https://thankview.com/video/58b741d0a57bb/allex?source=export	Giving Day *Bonus Opportunity!*
Colorado State University	https://thankview.com/video/57d084ba067b3/john-davidson?source=export	Phone-A-Thon Thanks
Swarthmore College	https://thankview.com/video/5903edbc48853/abigail-first-farber?source=export	Giving Day Challenge Thank You