5 Steps to Processing Event Invitations via Email

Create the Email Message

Navigate to the “Marketing and Communications” functional area.

Click on “Email marketing”.

Create the Package (Insert the Email)

Create the Event (If you haven’t already done so)

Create the Invitation (Insert the Package)

Process/Send the Invitation
Click on “Add from UGA email editor”.

Log into the Central Authentication Service screen with your UGA myID and password.
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**
Highlight and link the Communication Preferences and Privacy Policy in the last content block by clicking on the Special links drop down menu.

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.

### 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.

**Save the package.**
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.

Click “Add” to create a new invitation.
The screen below will appear. Enter the “General” details.

**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.

**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.**
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.

Choose “Constituent” to add invitees individually.

Choose “Multiple constituents” to add a selection of constituents created by AskIT.

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.

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. ***

*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/](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.