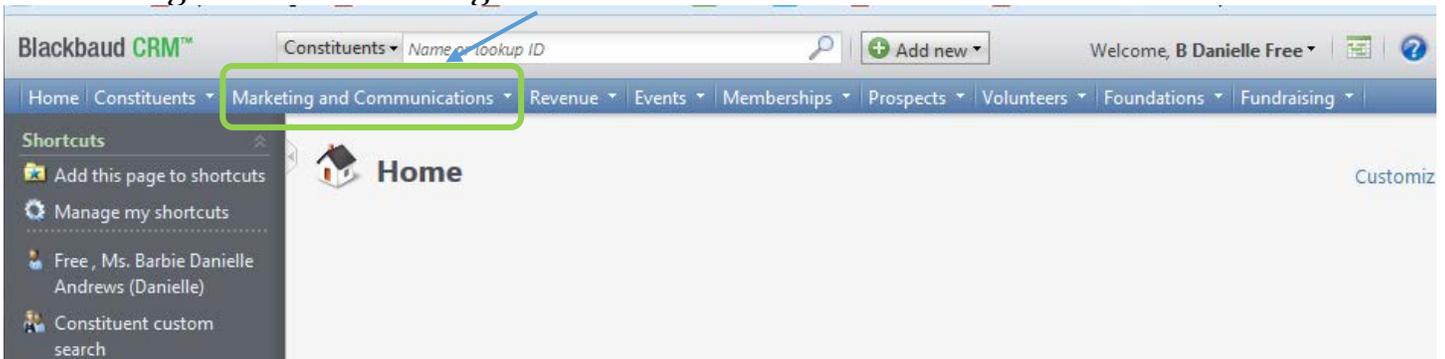


5 Steps to Processing Event Invitations via Email

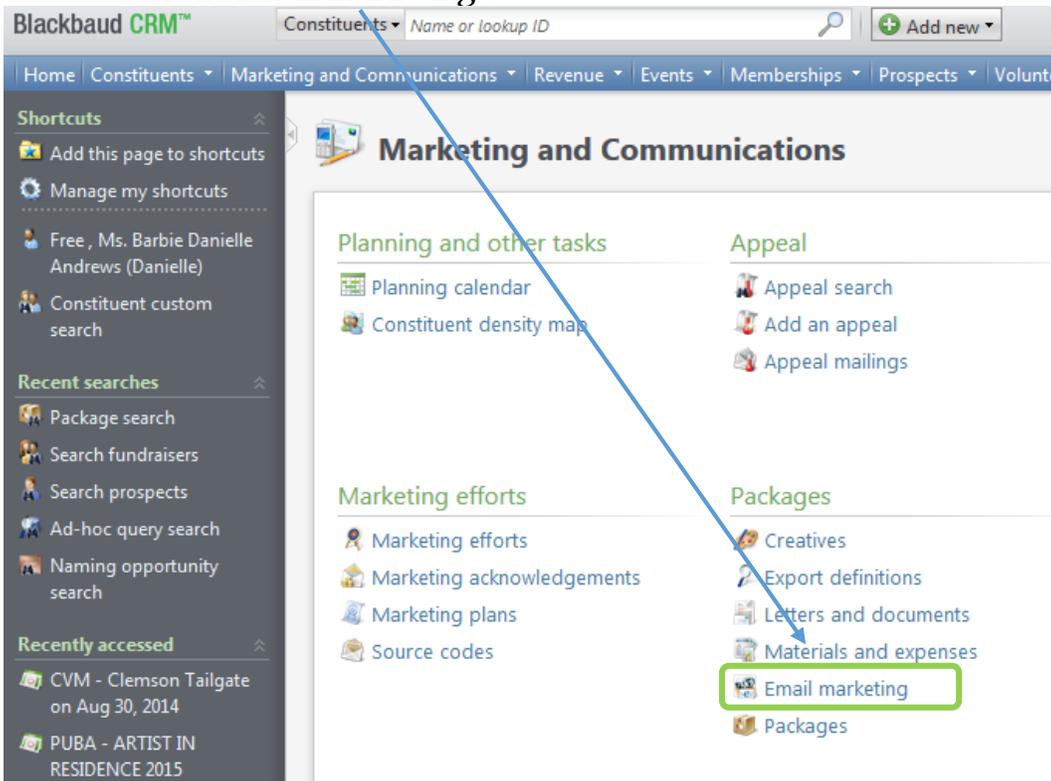


Create the Email Message

Navigate to the "Marketing and Communications" functional area.



Click on "Email marketing".



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

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Membership ▾

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Event search
- Direct marketing efforts
- Packages
- Segments
- Export

Recent searches

- Package search
- Constituent search
- Appeal search
- Purpose search
- Ad-hoc query search

Marketing and Communications **Email marketing**

Email marketing

- Email search
- View emails
- Add from UGA email editor**
- Add a direct marketing email
- Add a membership email
- Add a sponsorship email

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

Marketing and Communications ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Web ▾ Analysis ▾ Administration ▾ Training and Support ▾

UGA Email Editor

UNIVERSITY OF GEORGIA Help Desk Systems Status

CENTRAL AUTHENTICATION SERVICE (CAS)

Enter your UGA MyID and Password

Your UGA MyID

Password

Log in

[Forgot your password?](#)

UGA's Single Sign-on for Web Services

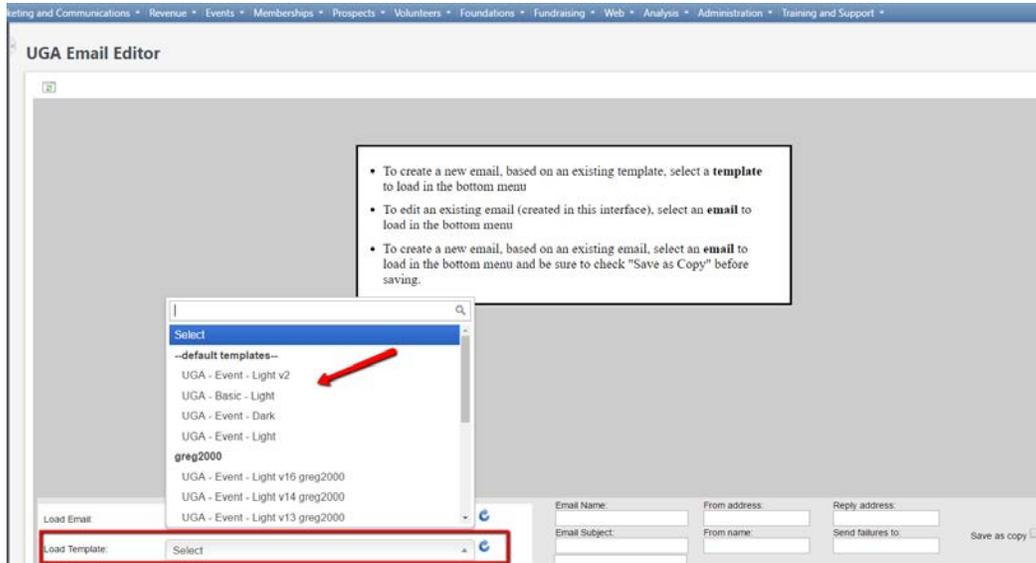
CAS provides a common login experience for users accessing UGA web services with their MyID credentials through a one-time login.

A number of UGA web services will soon switch to using CAS for logging in with their MyIDs.

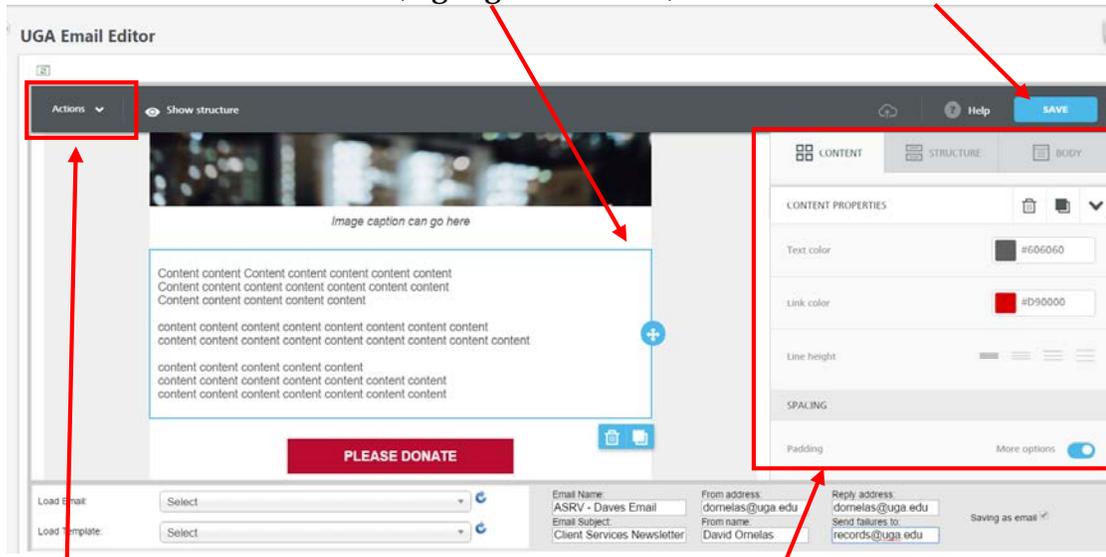
Your CAS login will be active for the next 30 minutes. To end your session, log out of the web application or close your web browser.

You should see a **green address bar** with University of Georgia and a lock in your web browser. This is an additional security measure to ensure you are

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.

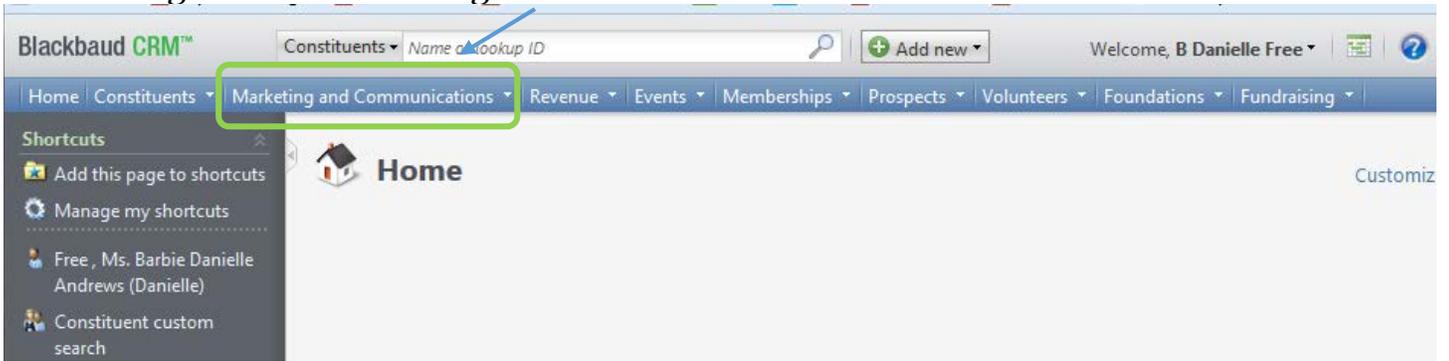
The screenshot shows an email editor interface. At the top, there are 'Actions' and 'Show structure' options. The main content area contains two paragraphs of placeholder text. A rich text editor toolbar is visible, including options for font (Arial, 14px), bold, italic, underline, strikethrough, link, 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 text 'communication preferences | privacy_policy | view in browser' in the content block below, which is highlighted with a red box. At the bottom, there are fields for 'Load Email' and 'Load Template' (both set to 'Select'), and a table for email metadata:

Email Name:	ASRV - Daves Email	From address:	dornelas@uga.edu
Email Subject:	Client Services Newsletter	From name:	David Ornelas

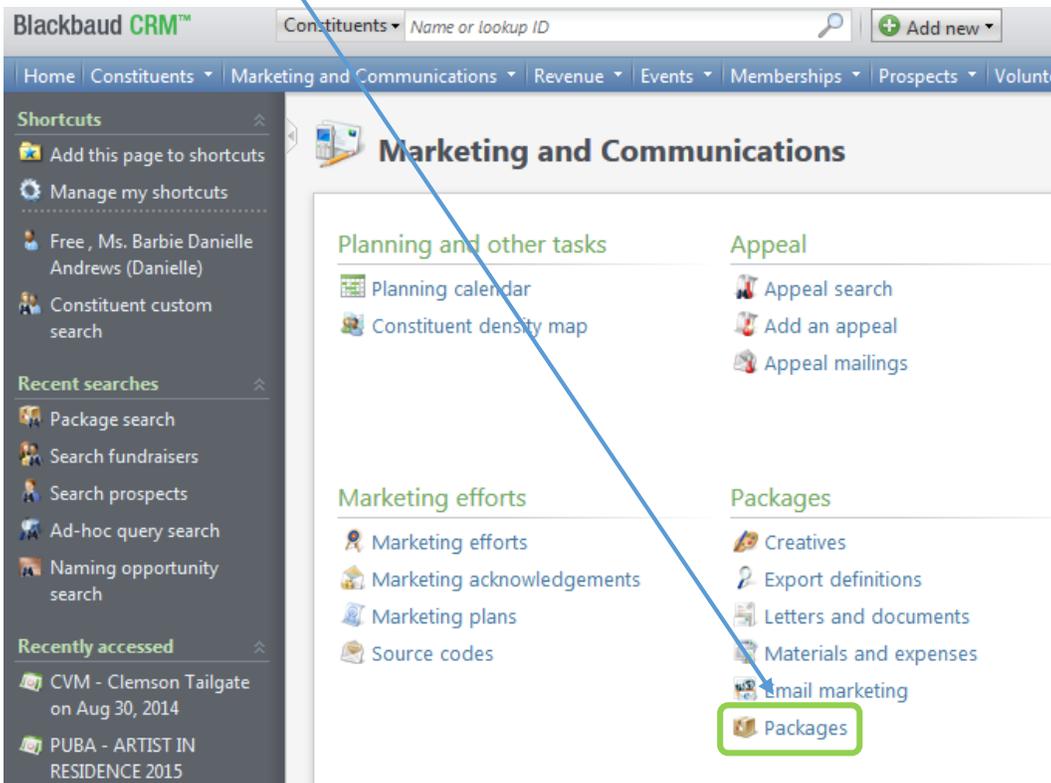
Save the email message.

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.

BDF - Danielle's Test Event

Event date: 7/24/2014 Status: Active

Site: Development and Alumni Relations Lookup ID: 8-10000709

Location: 8-10000709

Room/Unit:

Contact:

Coordinator:

Category:

Event expenses: Expense budget: \$0.00, Agreed expenses: \$0.00, Amount paid: \$0.00, 0% of budget

Event capacity: Event capacity: 0, Will attend: 1, Will not attend: 0, 0% of capacity

Tasks/Coordinators Registrations Registrants-More Details Speakers Expenses Options **Invitations** Designations Appeals Do

Coordinators (0) + Add 2 More ▾

Coordinator	Event	Primary
-------------	-------	---------

Tasks (0) + Add + Copy from 2 Filters 2 More ▾

Tasks: <All> Include completed ✓ Apply ✗ Reset

Name	Owner	Date due	Event
------	-------	----------	-------

Click “Add” to create a new invitation.

Tasks/Coordinators Registrations Registrants-More Details Speakers Expenses Options **Invitations** Designations App

Invitations (1) + Add 2 More ▾

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).

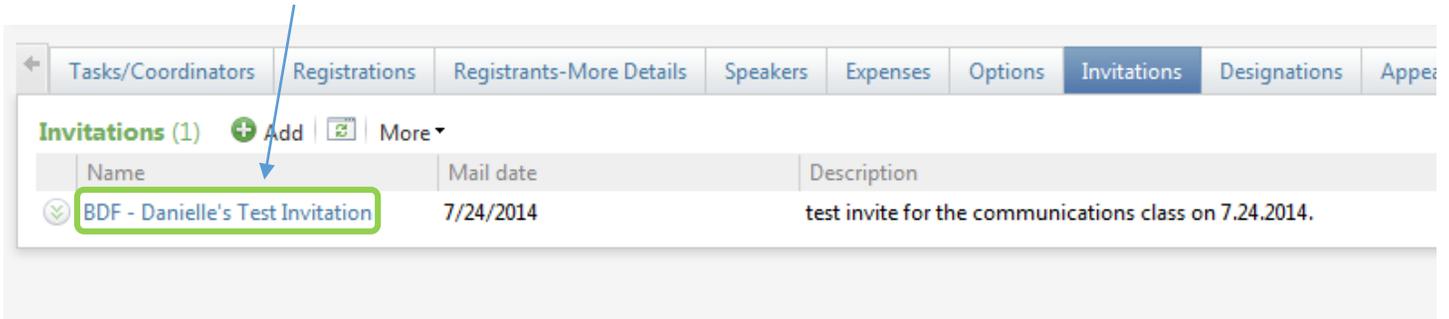
Name format: Select “Preferred Name Format”

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

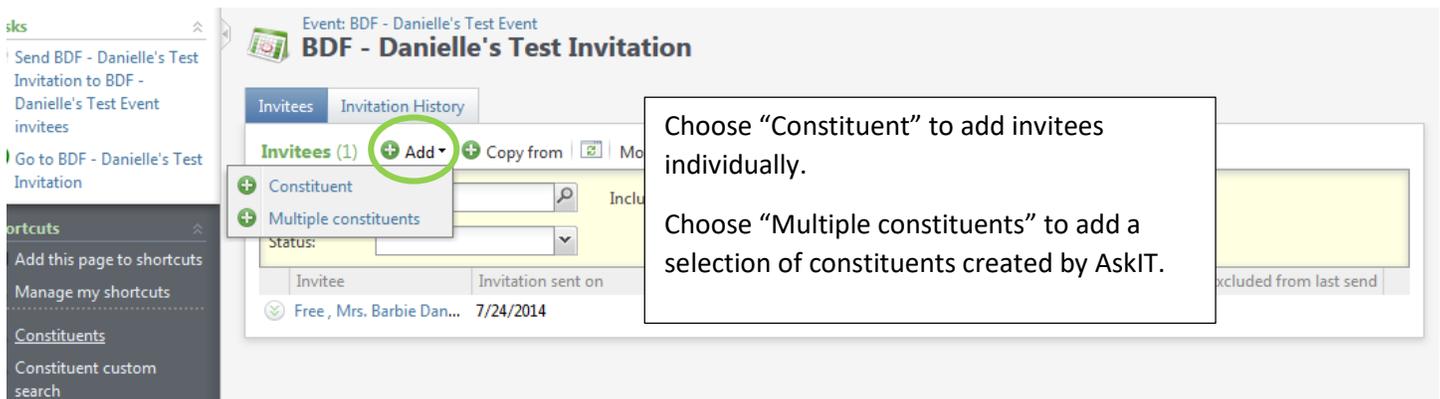
Save the invitation.

Process and Send the Invitation

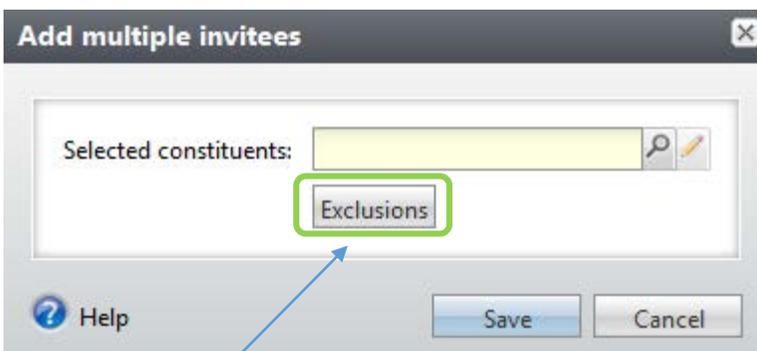
Select and click on the desired invitation name to add invitees.



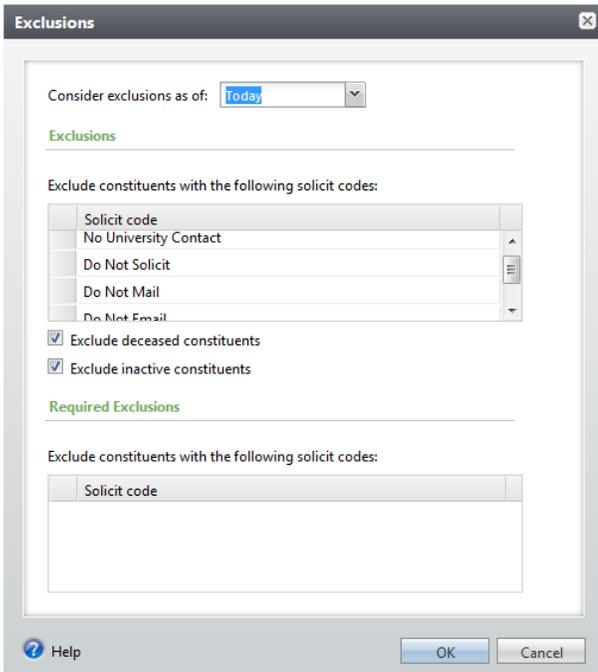
The screen below will appear. Click "Add" to select your desired constituents.



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

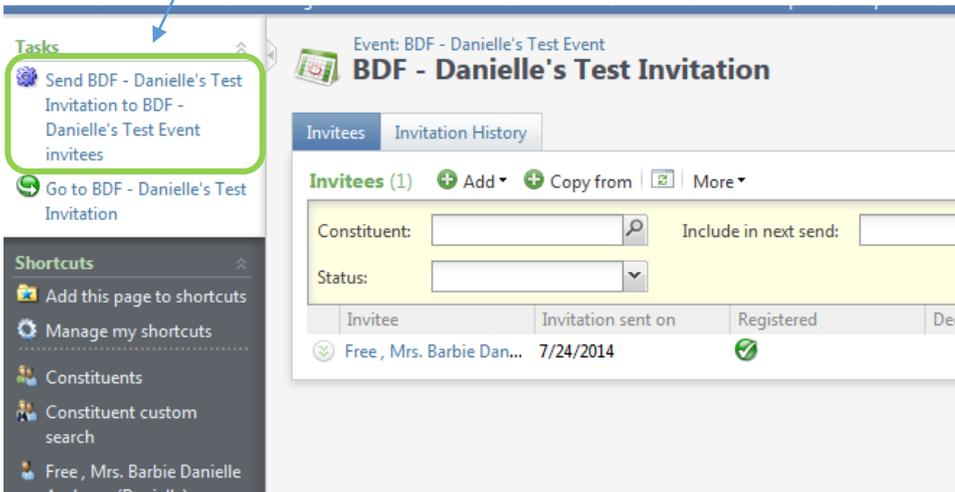
Do Not Email

Do Not Email – COE

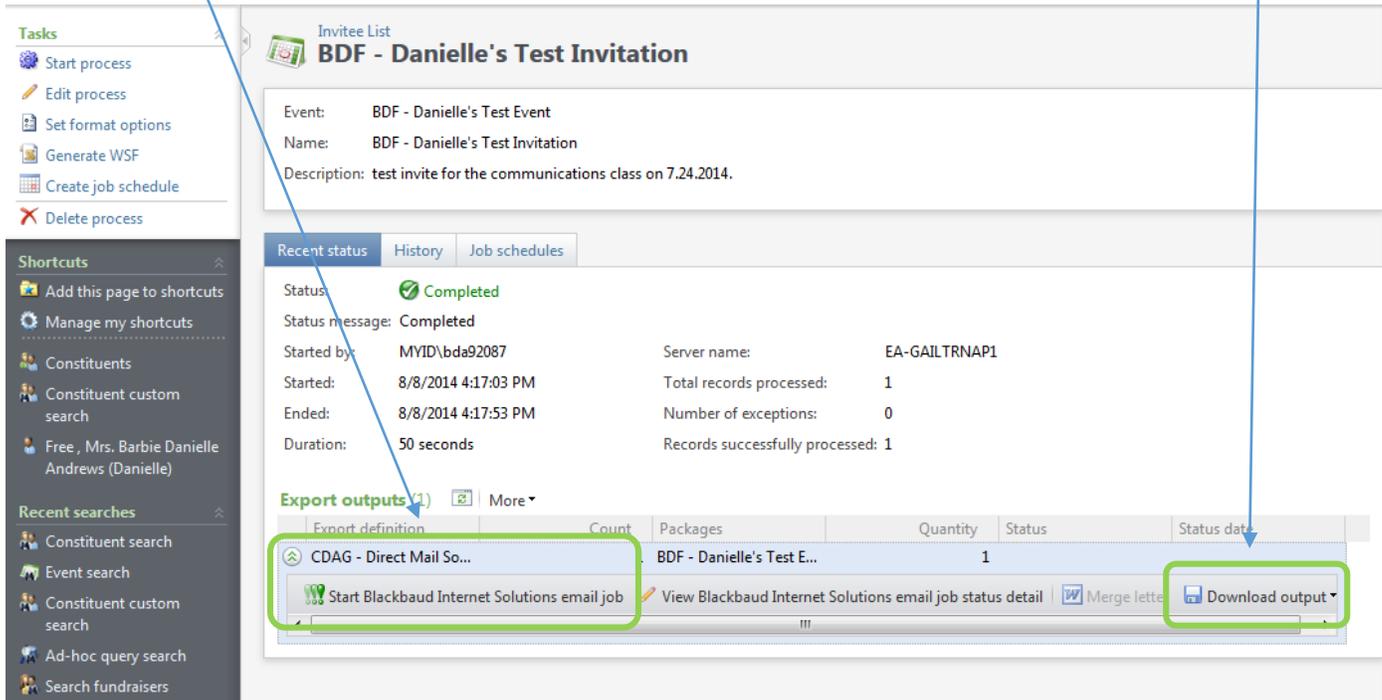
*If actively soliciting, please include the appropriate code *Do Not Solicit* to exclude constituents with this communication preference. Otherwise, delete *Do Not Solicit* and *Do Not Mail*.*

Click ok to save your exclusions.

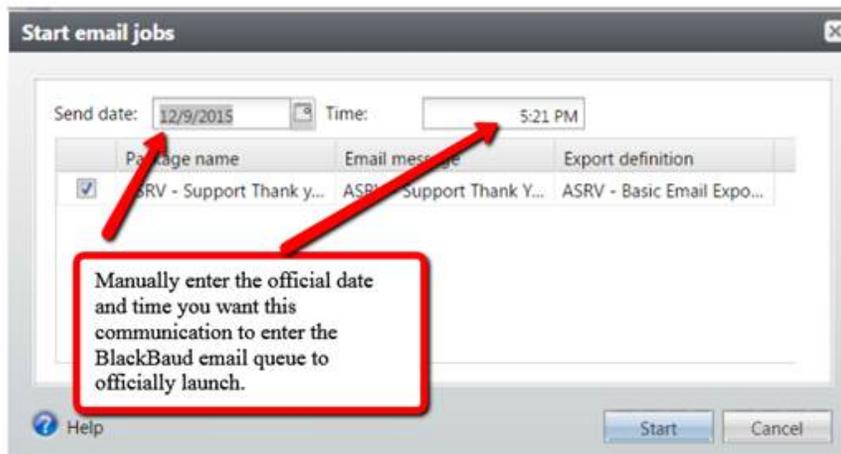
When you are satisfied that your list of invitees is complete and you are ready to send the invitation “Send” the invitation. Click “start” when the next dialogue box appears. This is not the actual sending of the email, it is the process that tags constituent records.



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.



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/>**

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.