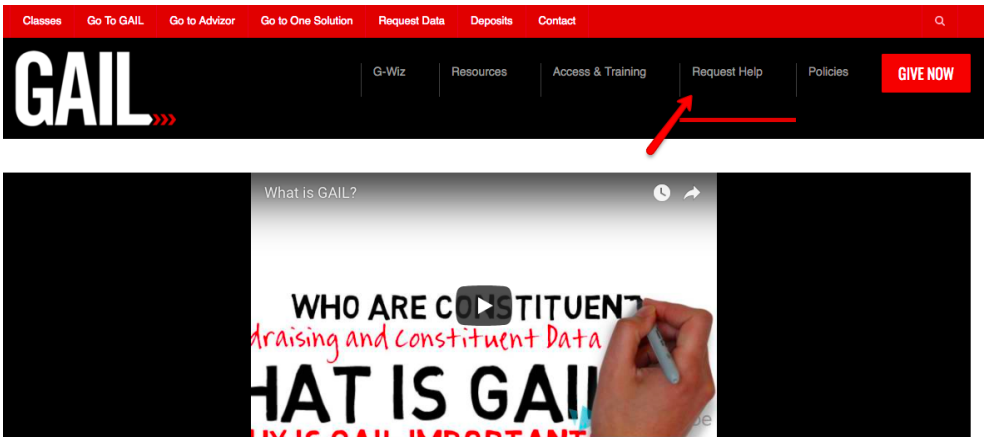
# How to Process a Postal Mail Direct Marketing Effort

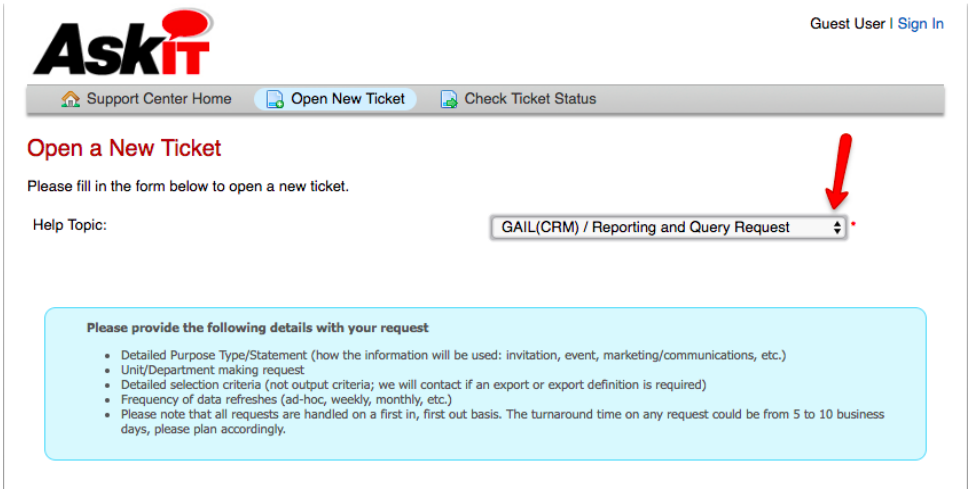
**Step 1. Request the Selection** (A selection is the list of individuals you are trying to reach with your communication.)

**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 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.



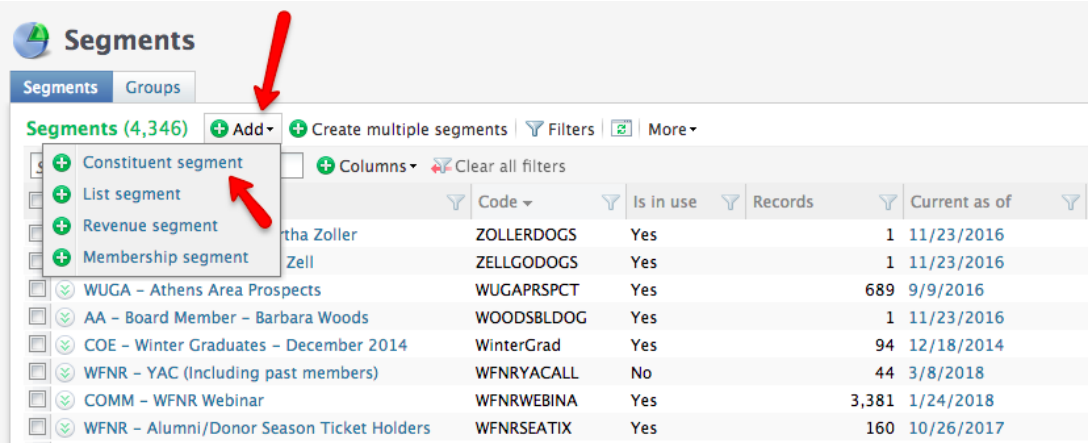
After you submit your selection request via ticket, you will receive an email response from the Query team with the name of your new selection. The selection name will begin with your naming convention and follow with a brief criteria description. (*Ex.* LAW - All Living Alumni)

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

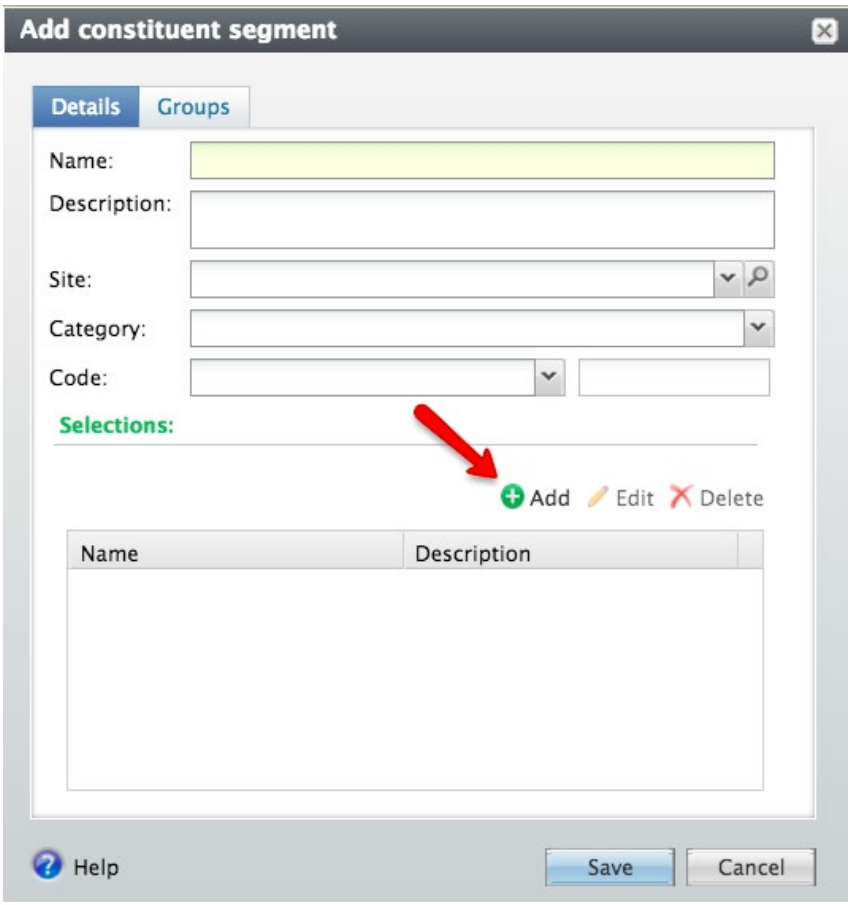
**Important Note:** This step should *only* be completed if a brand-new selection was requested in **Step 1**. Once a segment has been created, you can use it in multiple future marketing efforts.

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

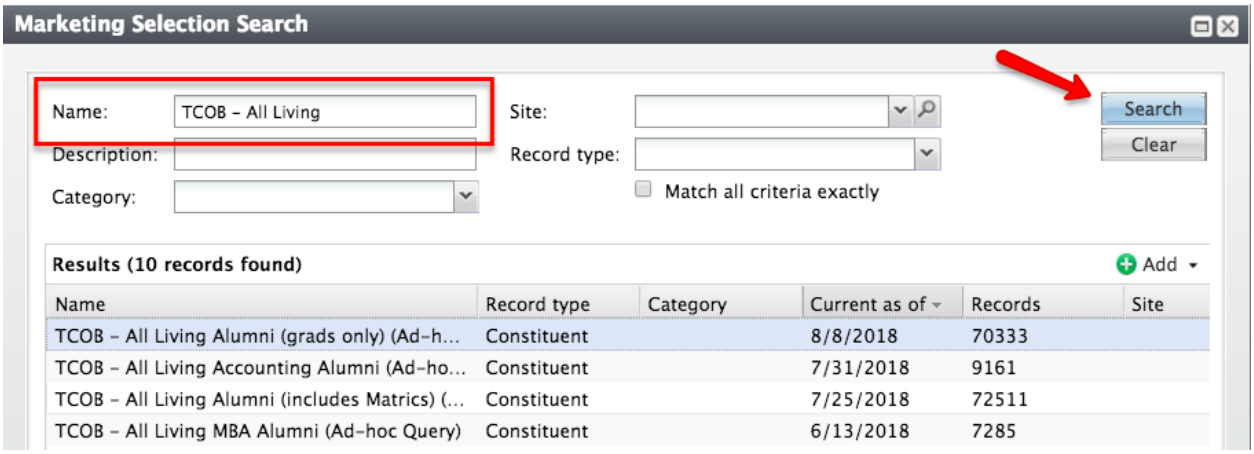

At the top of the new page, click the ***Add*** button and choose ***Constituent Segment.***



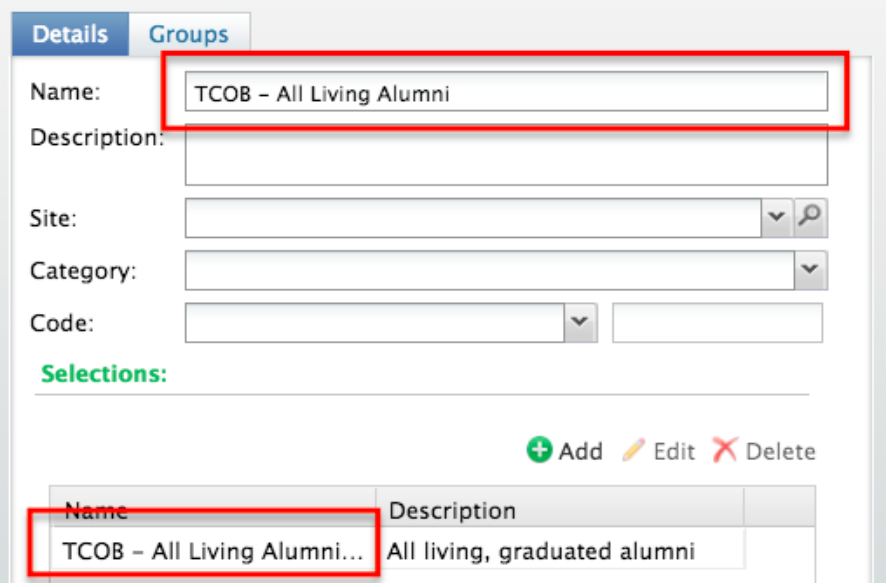
When the new pop-up window appears, click the ***Add*** button underneath the selections header.



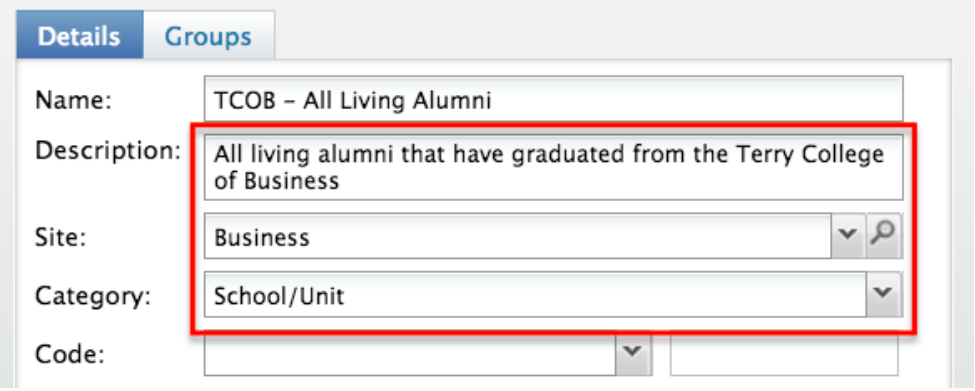

In the name field, search for and choose the name of your selection. *(**Reminder**:* The selection is the list of individuals you are trying to contact.*)* The name of your selection will have been provided to you by the Query team via email and it will begin with your naming convention.



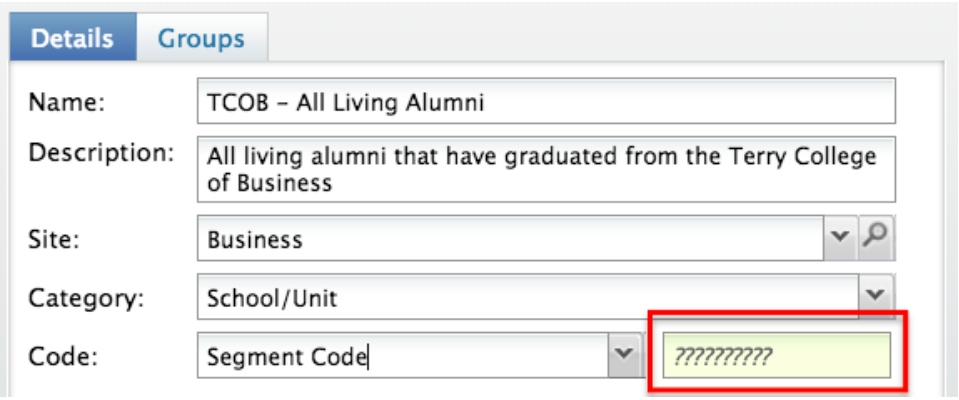
Once you have chosen your selection from the results list, name your segment to match. *(You will need to remember this name later when you are finalizing your marketing effort.)*



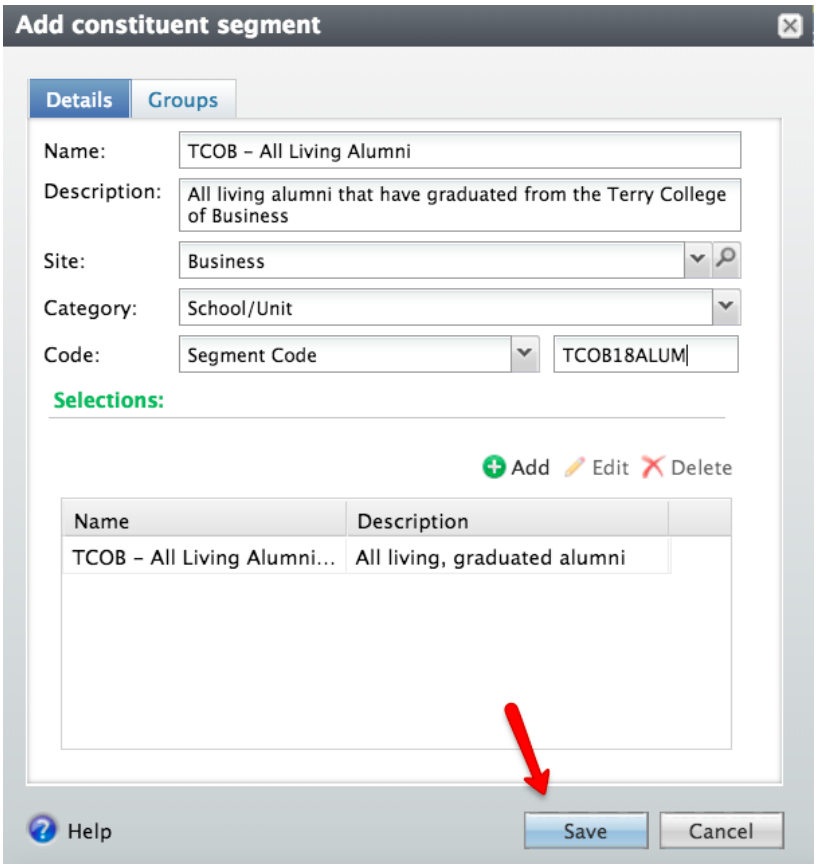

Enter a brief description that defines your segment. Then, choose your school/college/unit from the *Site* drop-down menu. For the *Category*, you will <u>always</u> choose ***School/Unit***.



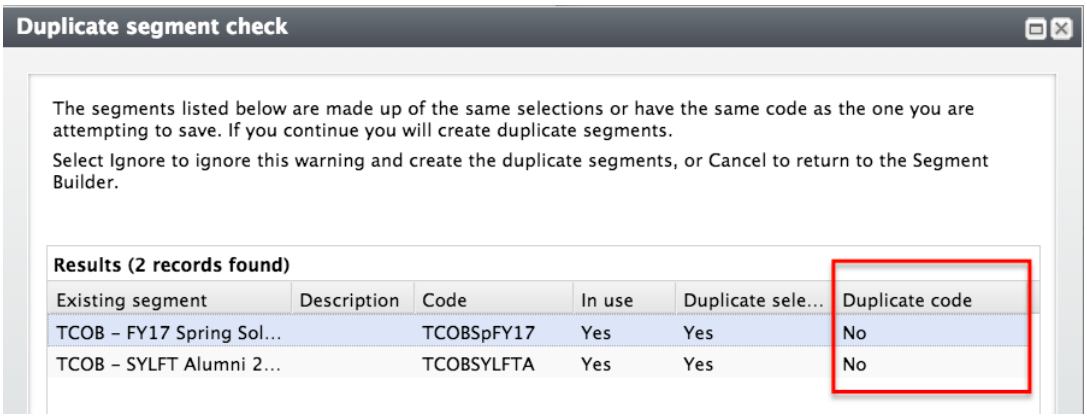
Choose, **Segment Code** from the *Code* drop-down menu. In the yellow highlighted field, enter a **10-digit** code consisting of letters and numbers. The code should always begin with your naming convention and current fiscal year. (ex. TCOB19ALUM, COE18DONOR)




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

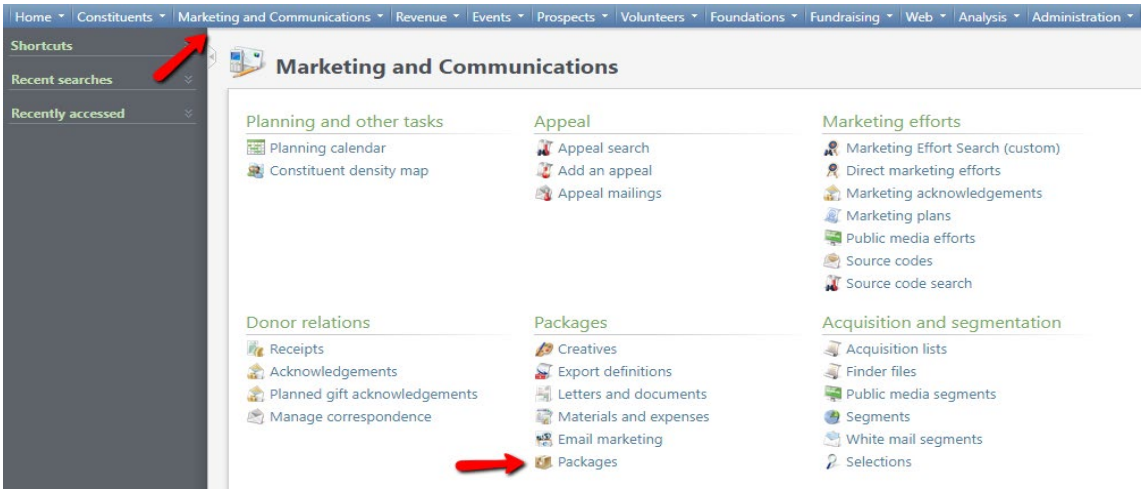


**Important Note:** After clicking save, you may see a pop-up window for a *Duplicate Segment Check*. Confirm that all the duplicate codes say **No**, then click **Ignore**. If a duplicate code says **Yes**, you will need to click **Cancel** and change your 10-digit code. ***Most of the time, you will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

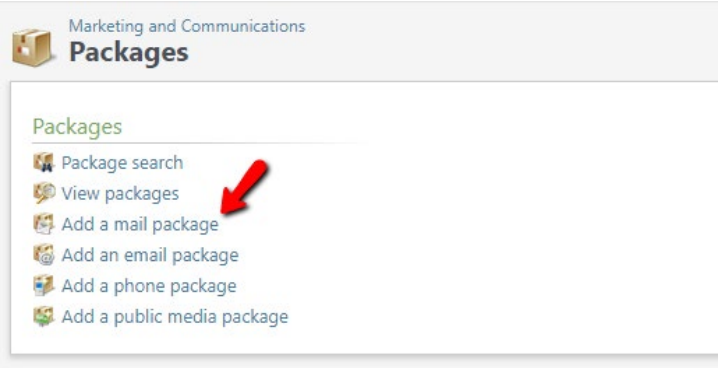



## Step 3. Create the Package

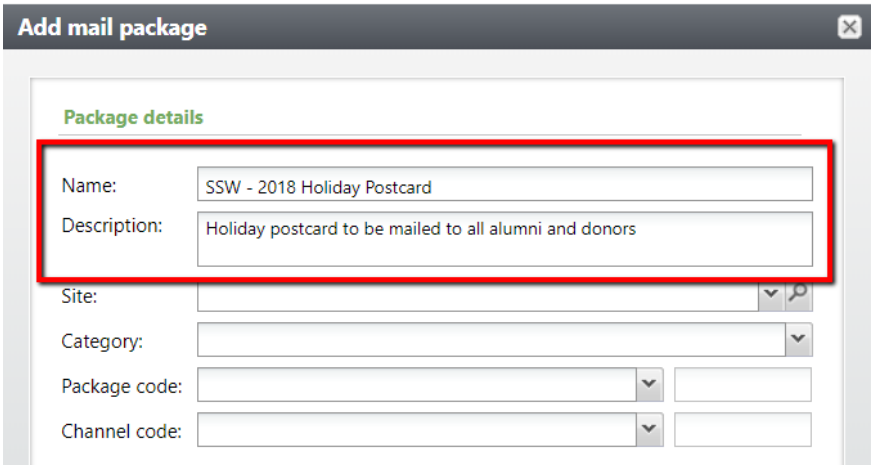
To create a package, navigate to the marketing and communications functional are. Then click ***Packages***.



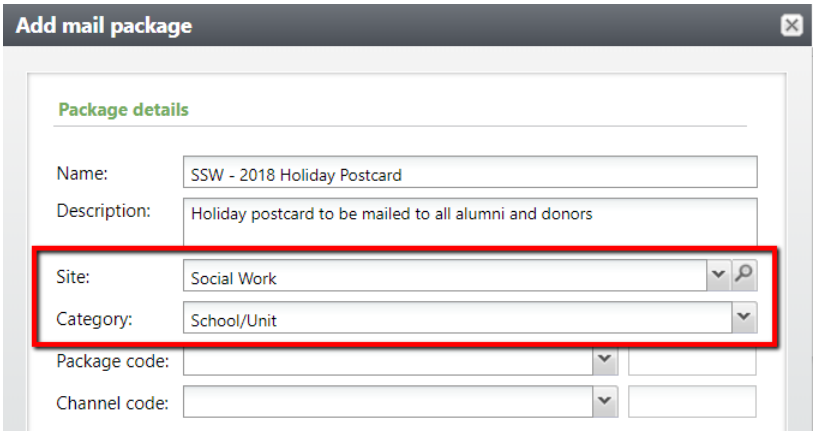
Choose ***add a mail package***.



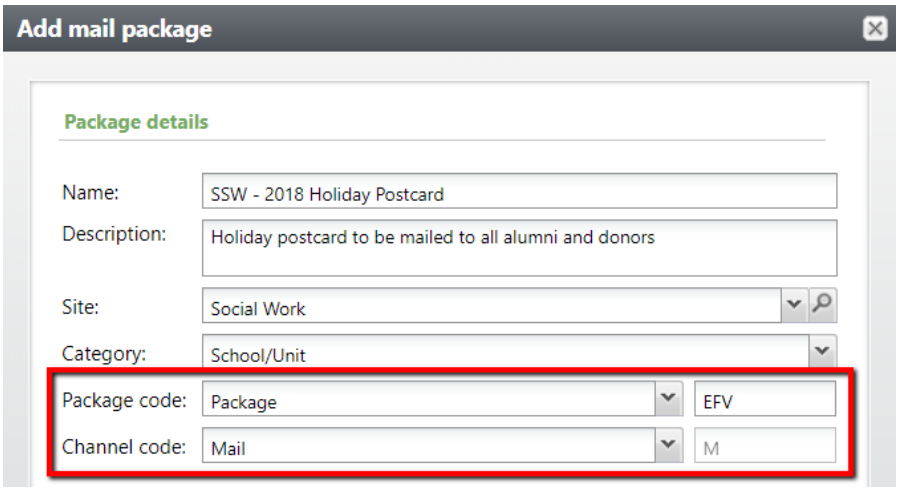

When the new pop-up window appears, name your package beginning with your naming convention and the current year. Add a brief description that describes the mailing.



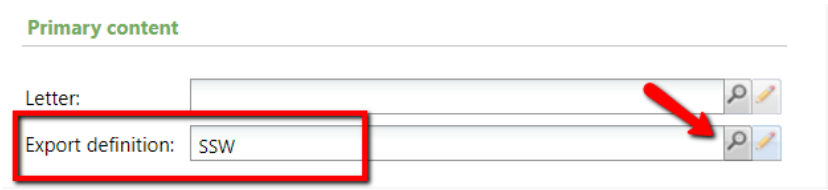

Choose your school/college/unit from the *Site* drop-down menu. For the *Category*, you will <u>always</u> choose ***School/Unit***.



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 **Mail**.

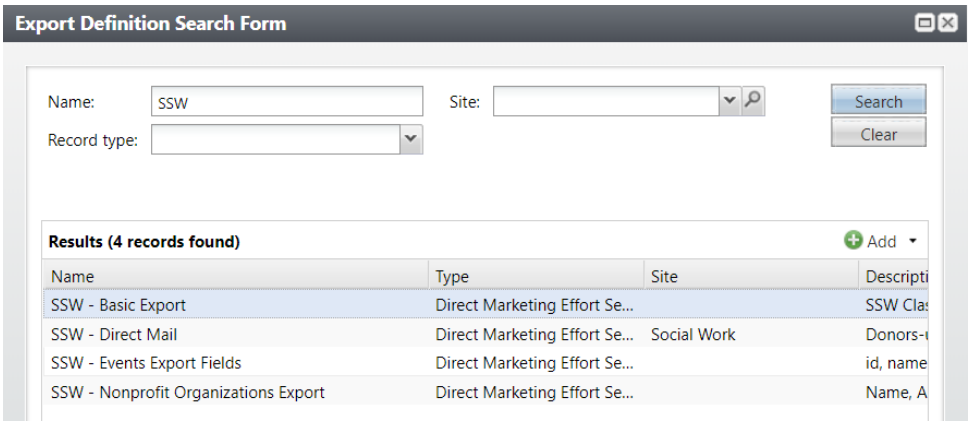



In the Primary Content section, click the into the ***Export definition*** field and type your naming convention. Then click the magnifying glass icon to search.

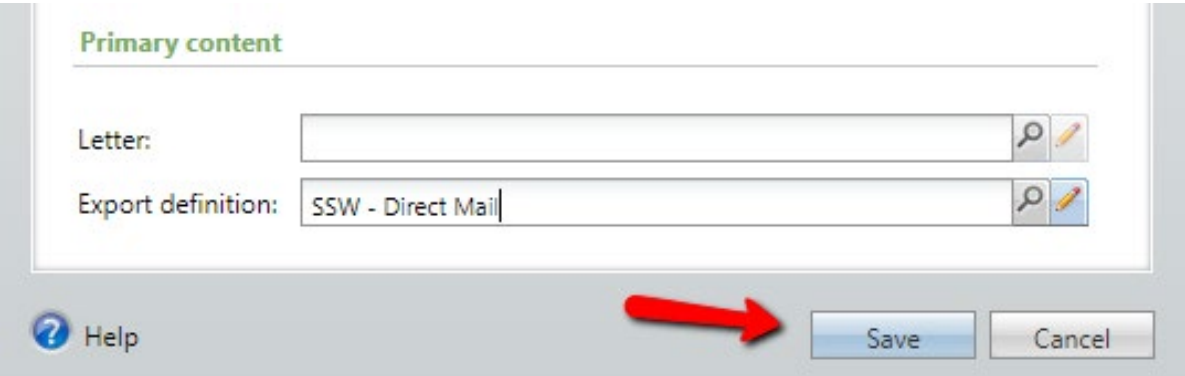



Choose the appropriate export definition from the results list.

**Important Note:** The export definition tells your marketing effort what information to provide in your final mailing spreadsheet. (Ex. Address, Phone Number, Class Year, Lifetime Giving, etc.) If you are unsure which export definition to choose, please email *askit@uga.edu.*

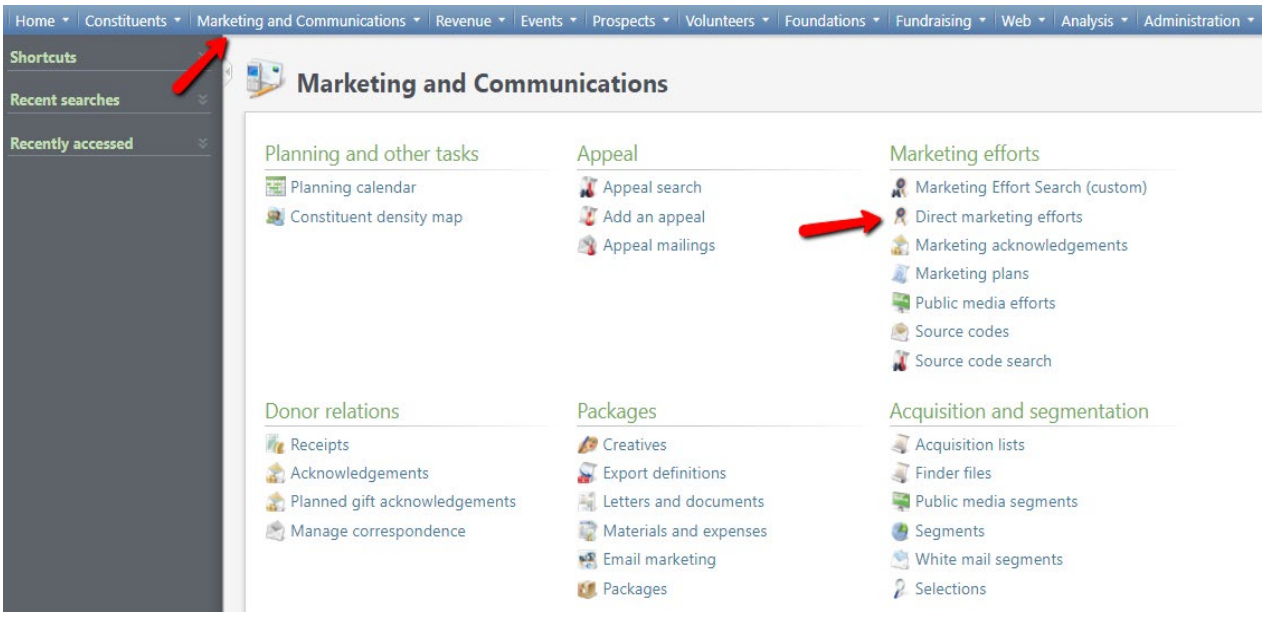


Click **Save** when you are finished.

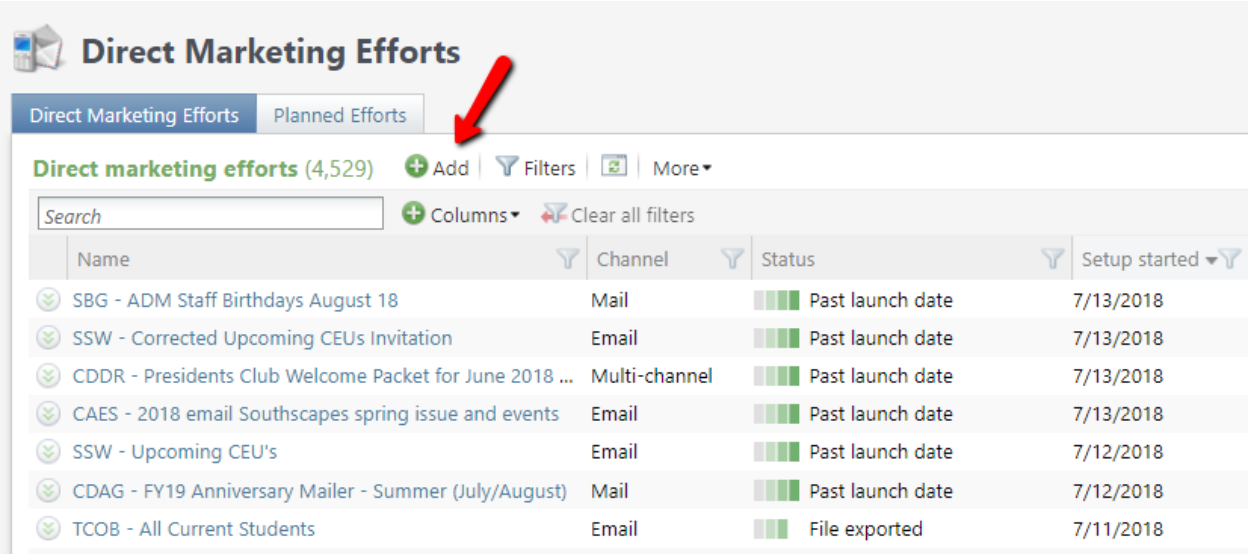



**Step 4. Create the Marketing Effort** (A marketing effort is the framework that contains all the information about your specific communication.)

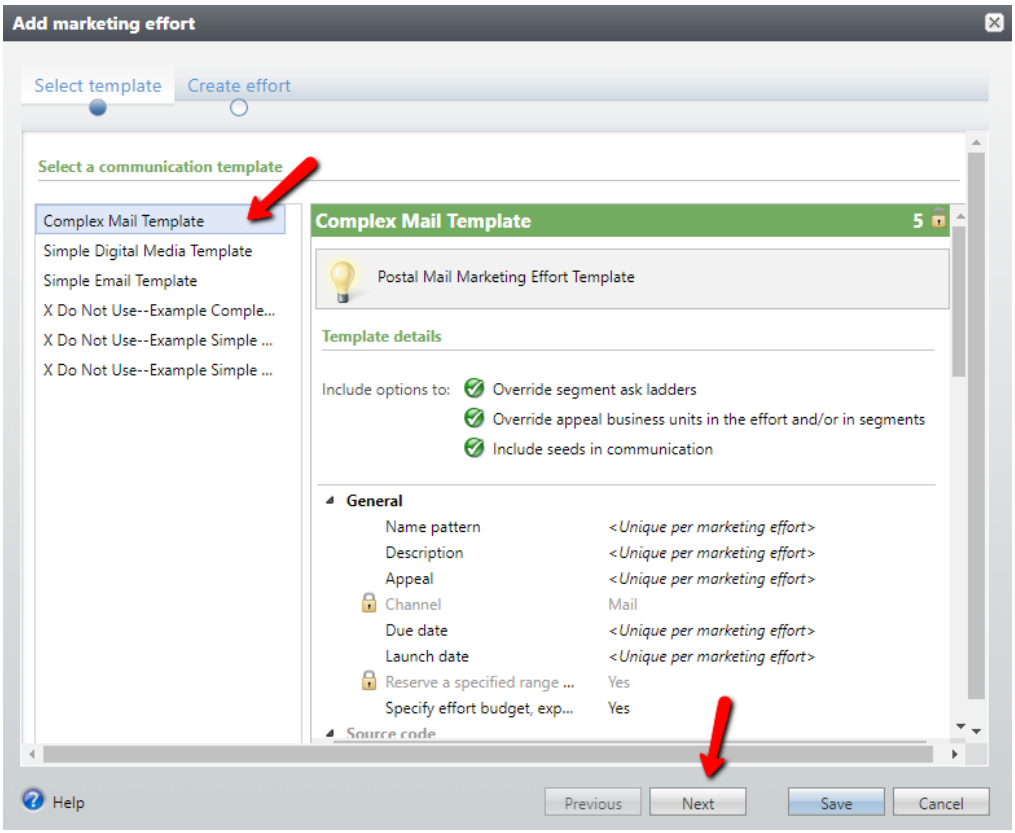
To create a new marketing effort, navigate to the marketing and communications functional area and click **Direct Marketing Efforts**.



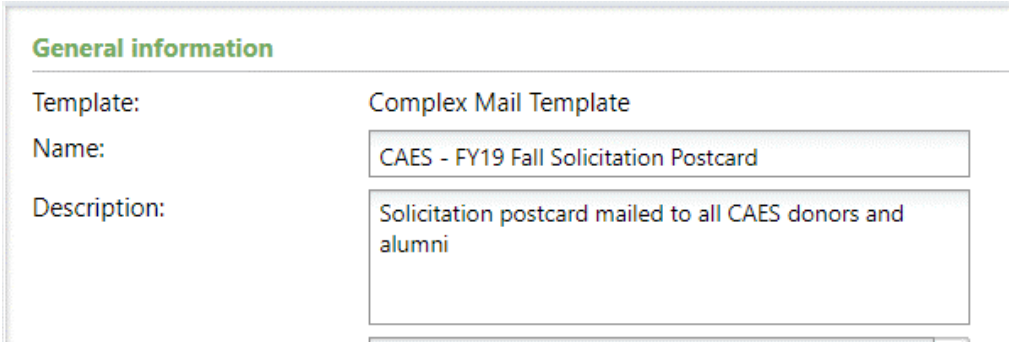
Click the **Add** button.



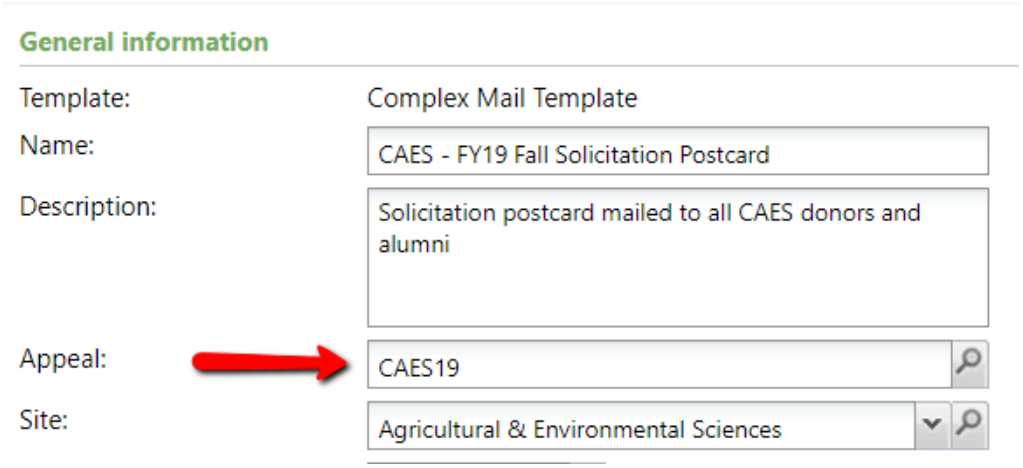

Select the **Complex Mail Template** and click **Next**.



**Name** your marketing effort and write a brief **Description** of your communication. (*Your effort name should match the package name you created in Step 3.)*

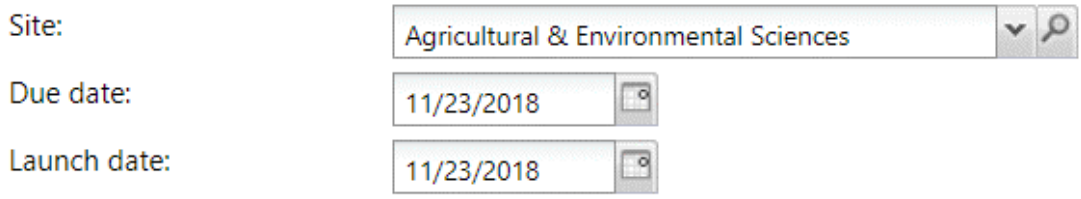



Search for the name of your **Appeal** beginning with your naming convention. You should select the appeal which ends in the current fiscal year. (*Appeals are used to measure marketing efforts within a given fiscal year.*)

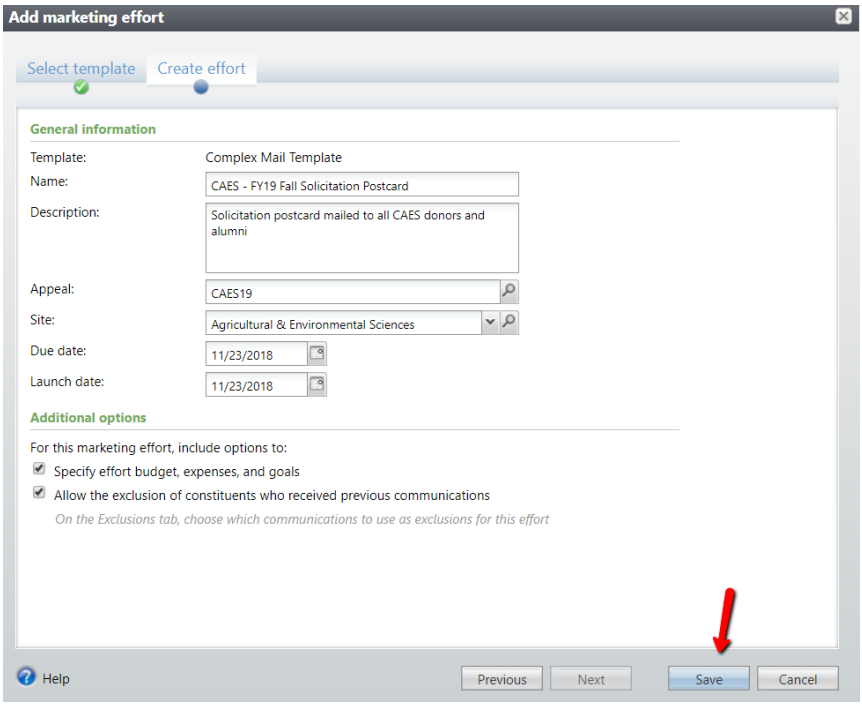



Choose your school/unit from the **Site** drop-down menu and set a **Due Date** and **Launch Date**.

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

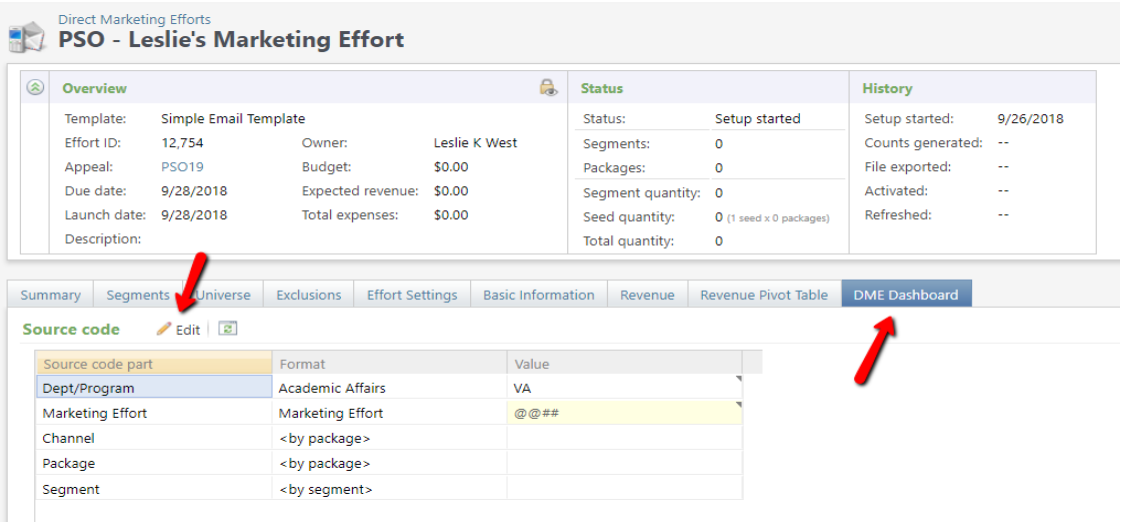


Click **Save** when you are finished.

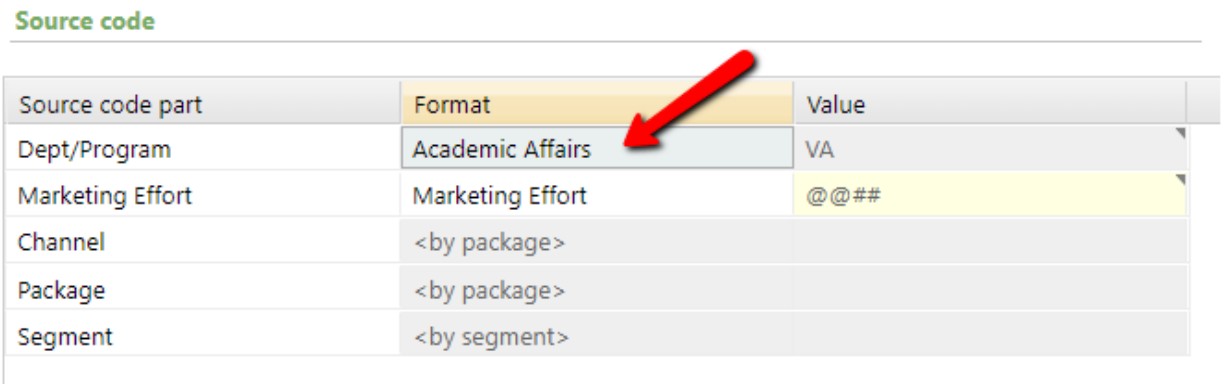



**Step 5. Finish the Source Code** (The source code makes each marketing effort unique and helps revenue and other data find its way back to the source.)

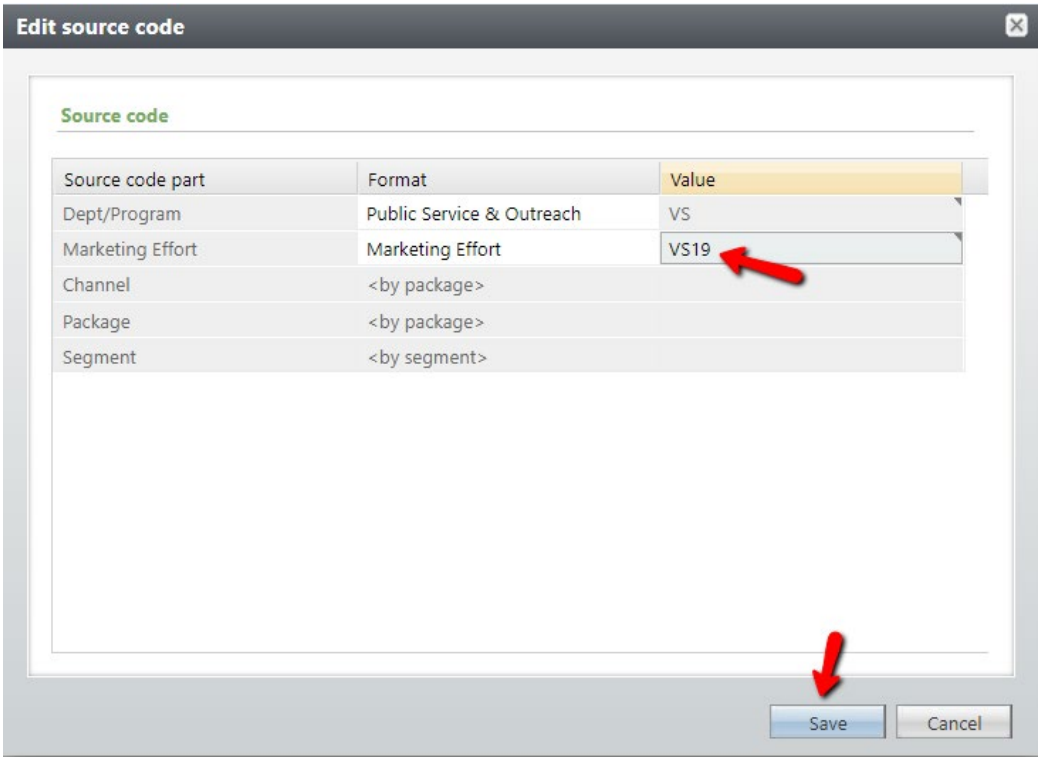
Within your marketing effort, click on the **DME Dashboard** tab. Then, click the *Edit* button next to the **Source Code** header.



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.*)

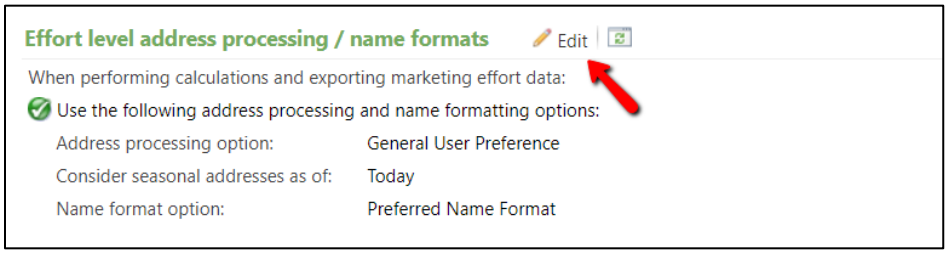



Next, click into the value field highlighted in yellow. Enter your **2-letter value code + the current fiscal year.** (*For example, if I was from the business school and it was FY18, I would enter BU18. If I was from the law school and it was FY19, I would enter LW19.*)

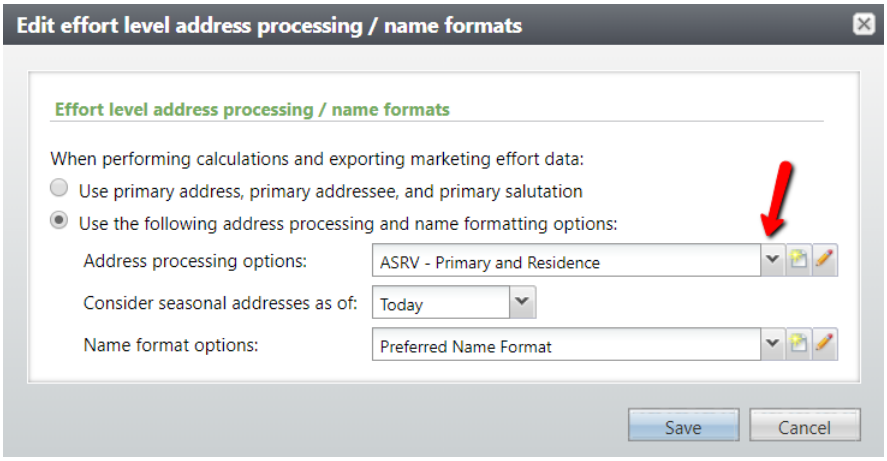


## Step 6. Adjust Address Processing & Name Formats

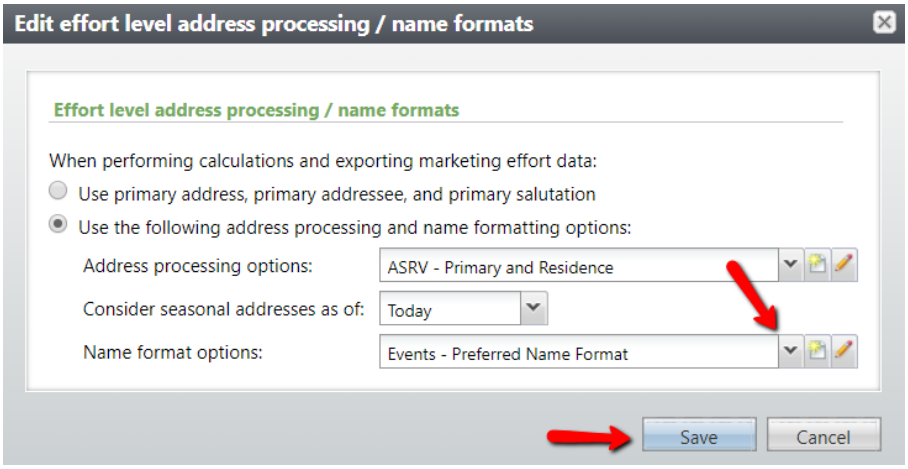
Still within the **DME Dashboard** tab, click *Edit* next to the **Effort level address processing**.




Click into the *Address processing* menu and choose **ASRV – Primary and Residence**. *(This will remove anyone from your mailer who does not have an address listed in GAIL.)*

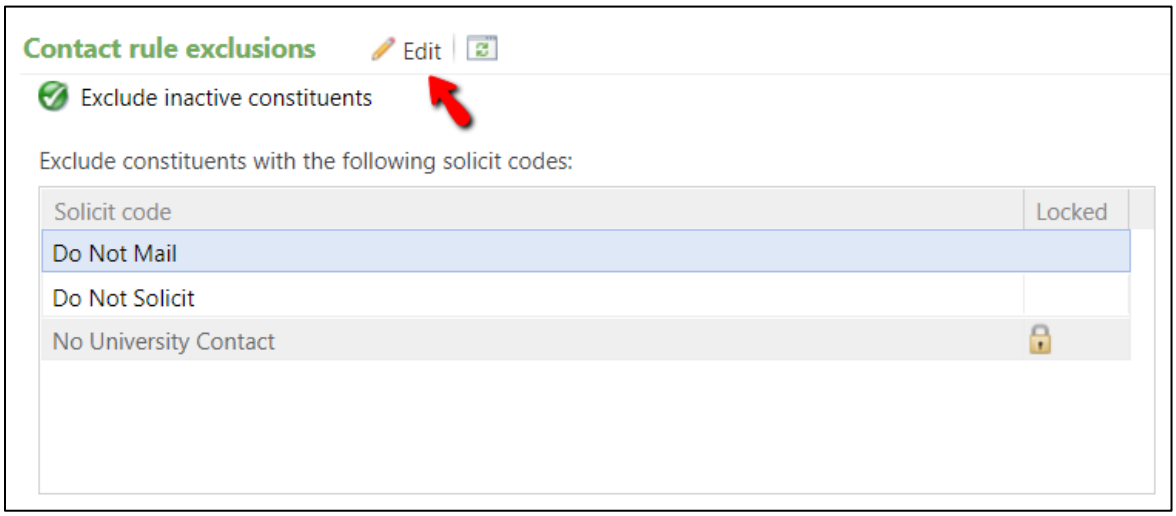



Click into the *Name format* menu and choose **Events – Preferred Name Format.** *(This will include constituent spouses on your mailer.)* **Save** when you are finished.

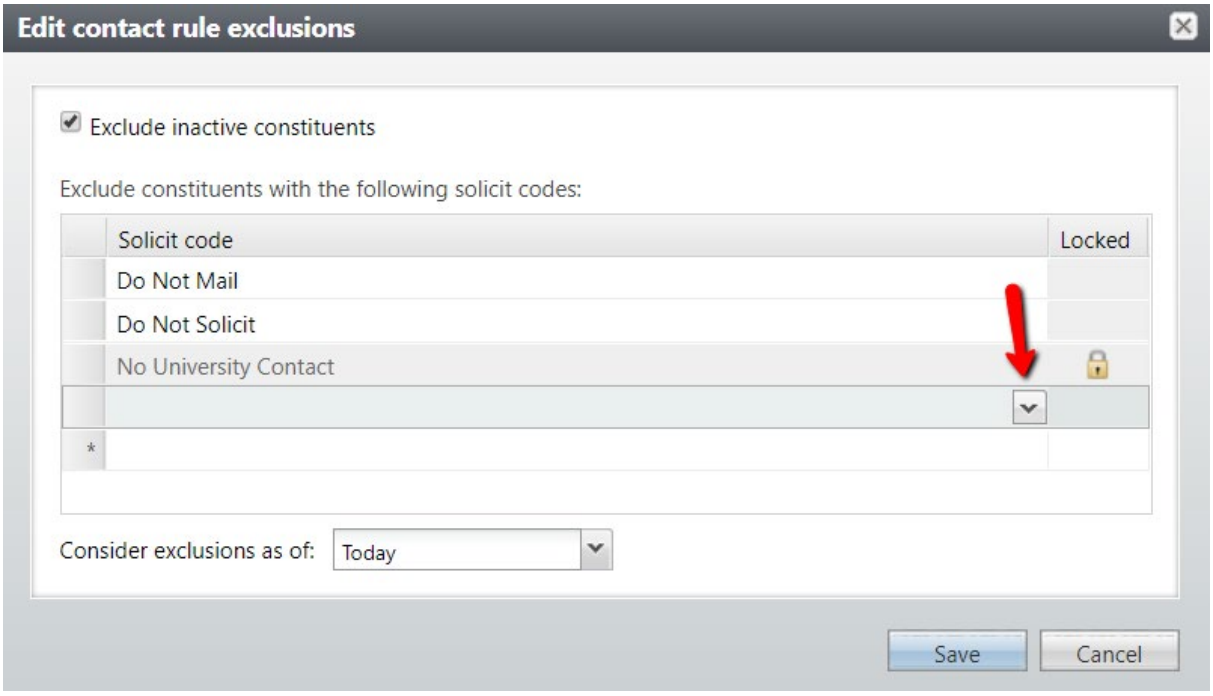


**Step 7. Add the Exclusions** (Exclusions are settings we use to remove certain constituents from our communication.)

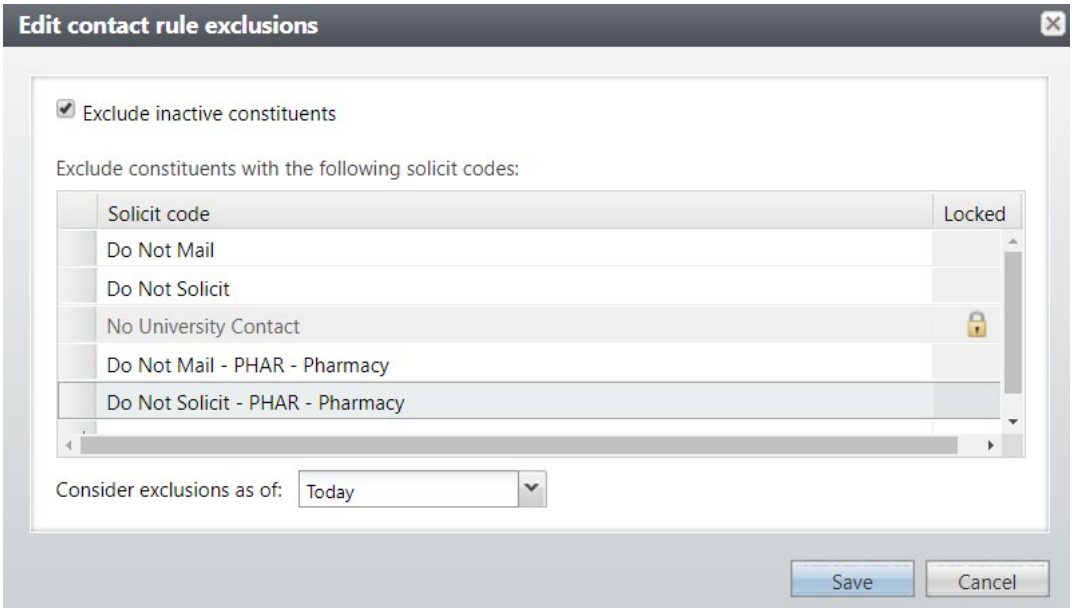
Still within the **DME Dashboard** tab, click *Edit* next to the **Contact Rule Exclusions** header.



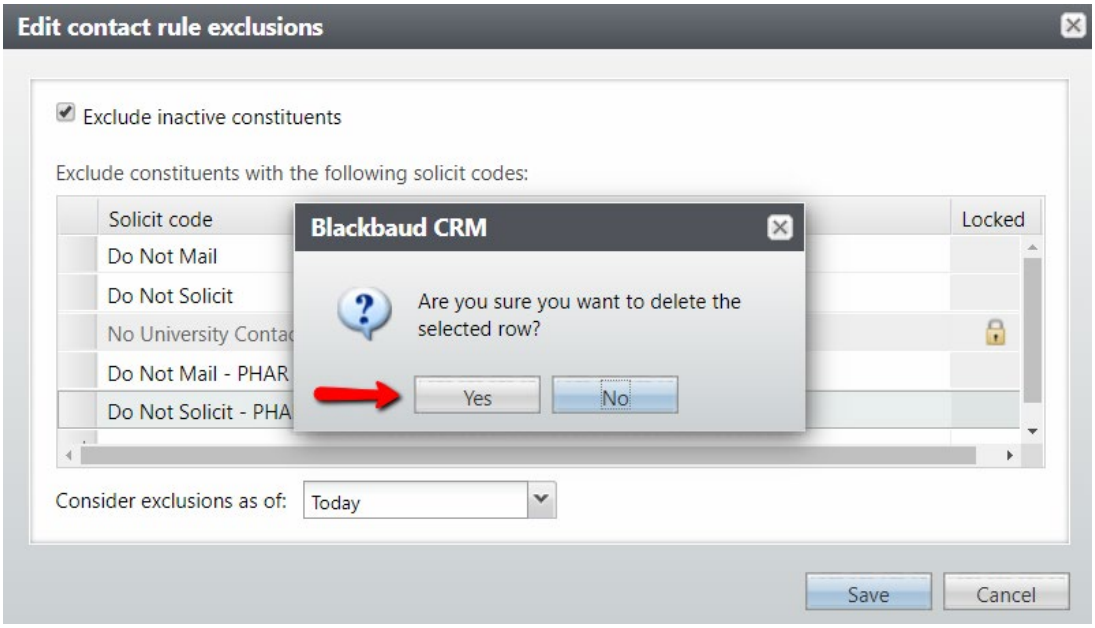

Click into the blank field below *No University Contact* and add the **Do Not Mail specific** to your school/unit. (Ex. *Do Not Mail - COE*)



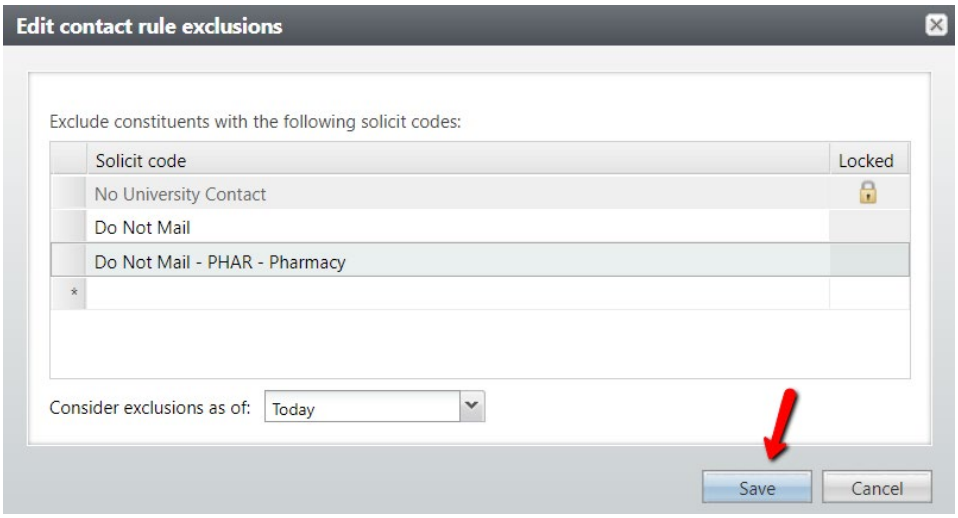
**Important Note:** If you are sending a solicitation communication (*meaning you are asking constituents for donations*) you will also need to add the **Do Not Solicit specific** to your school/unit.




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.

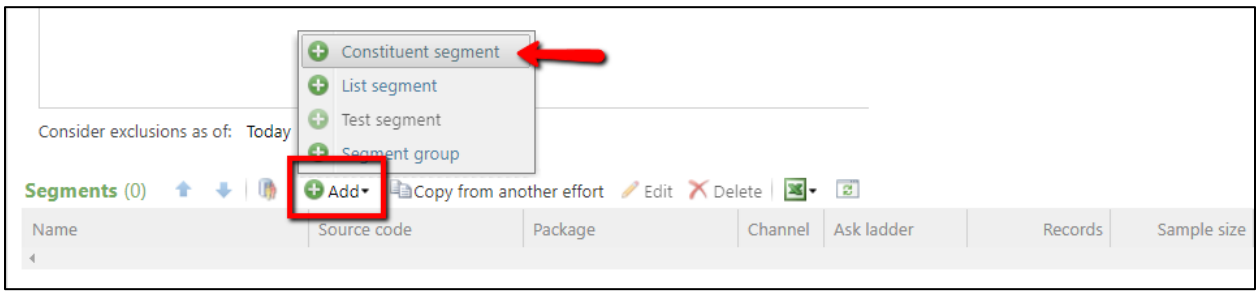


Click **Save** when you have chosen your appropriate exclusions.

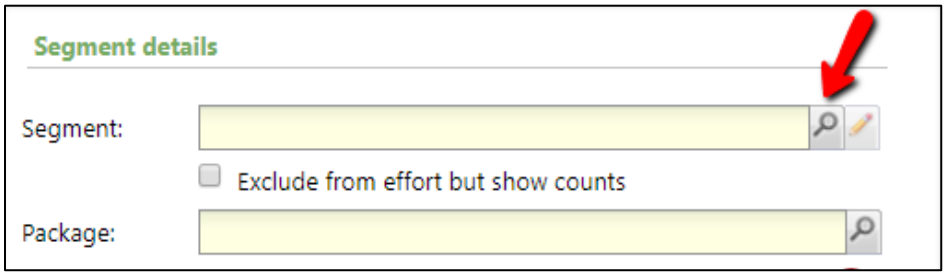



## Step 8. Tie Together Your Segment(s) & Package

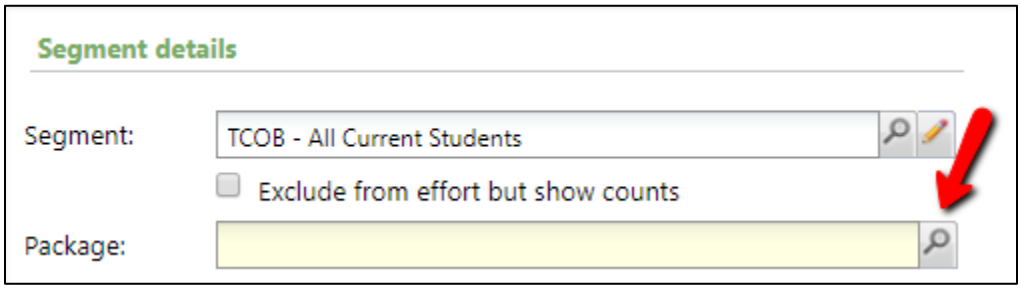
At the bottom of your *DME Dashboard*, click *Add* next to the **Segments** header.
Then choose **Constituent Segment**.



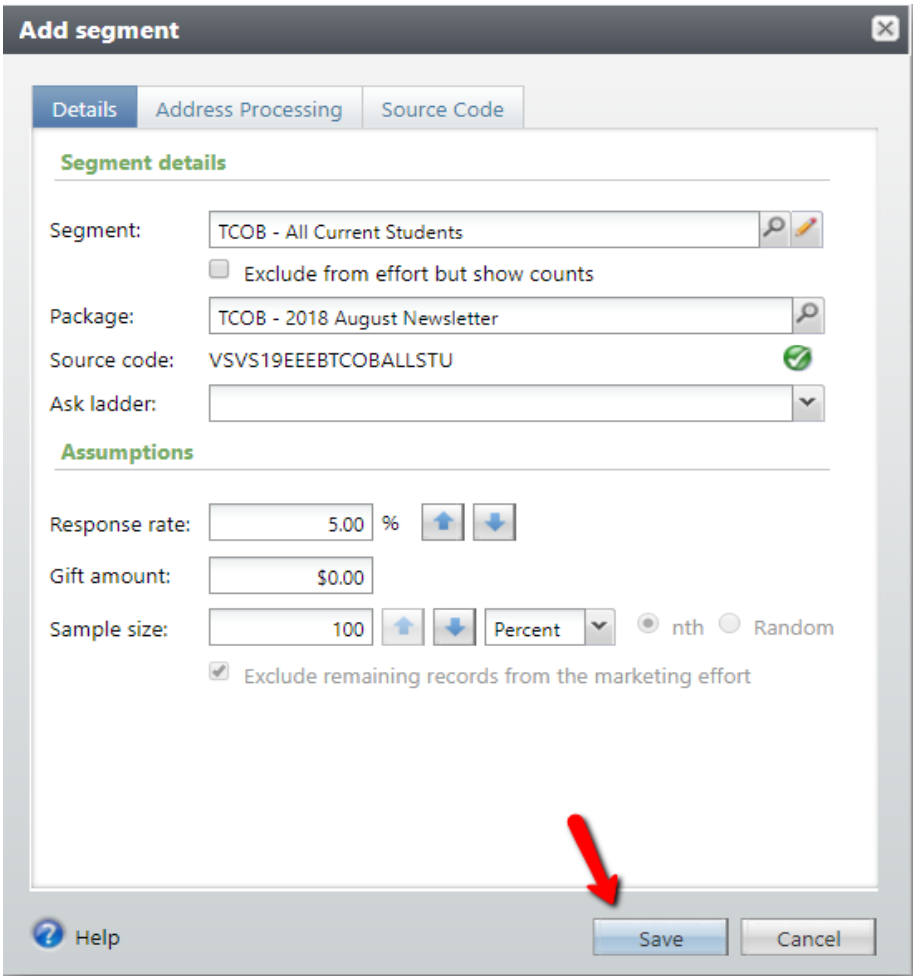

Search for and select the name of your Segment. (**Remember:** Your Segment contains the list of individuals you want to reach with your communication.)



Then search for and select the name of your Package. *(We created our Package in Step 3.)*

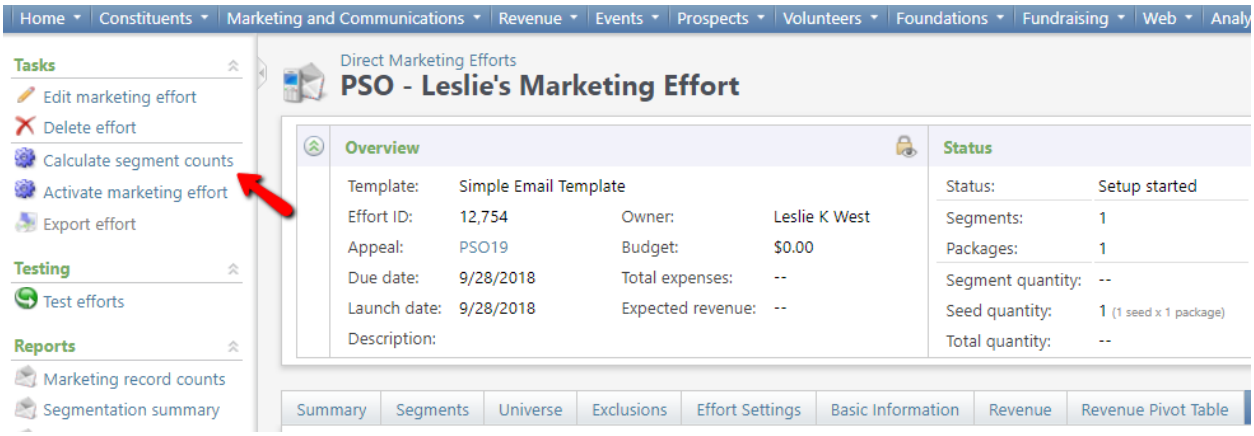



Click **Save** to connect your Segment and Package. (*If you would like to add more Segments to your marketing effort, repeat **Step 8**.*)

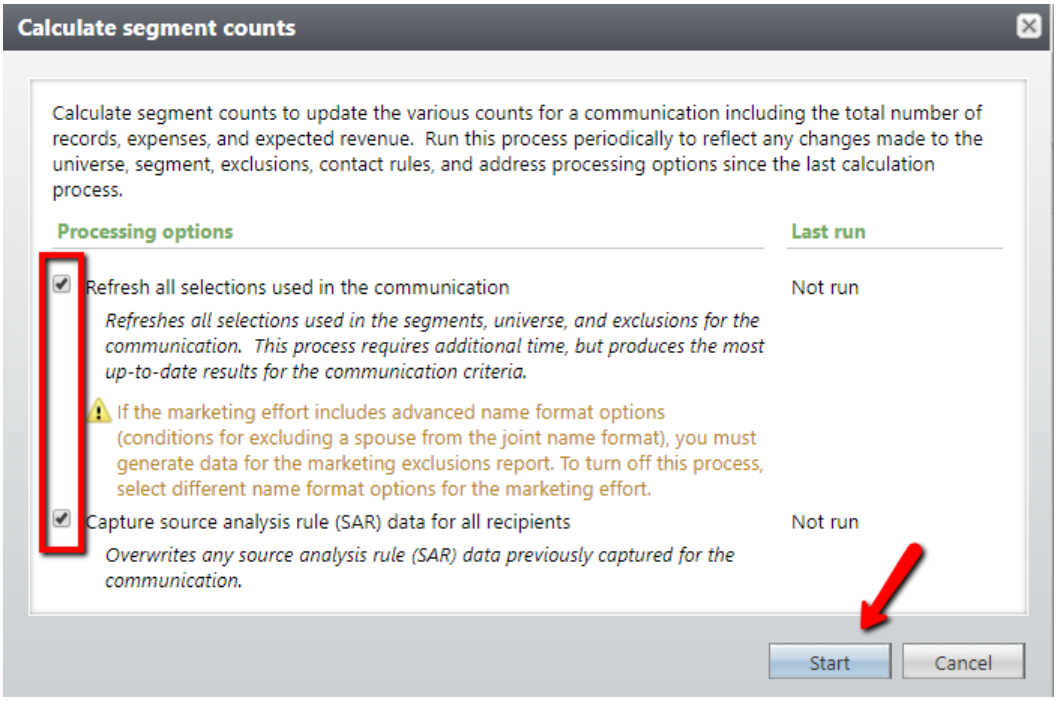


**Step 9. Calculate** (Calculating your marketing effort will refresh your selection(s) so that you have the most up-to-date data on your constituent list.)

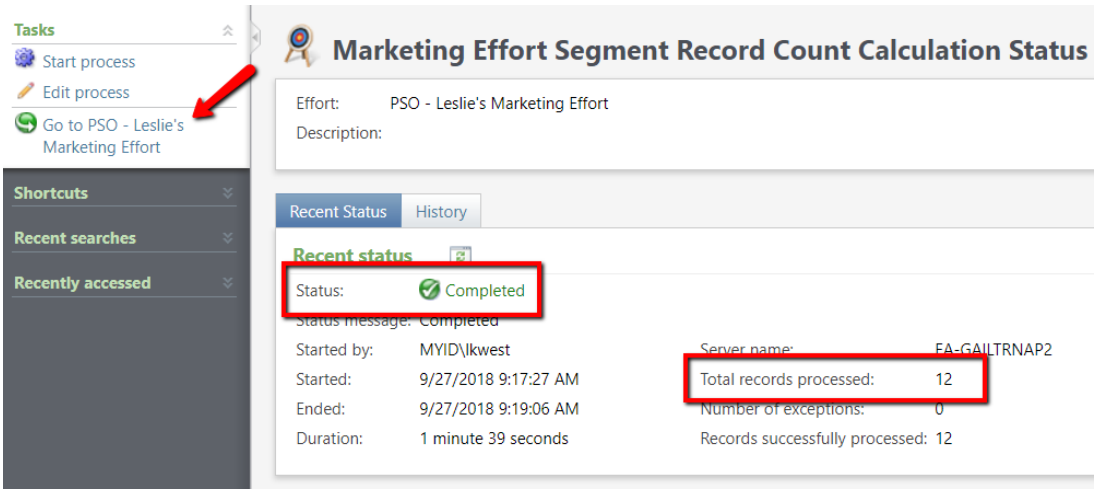
When you have completed **Steps 1-8**, you can calculate your marketing effort. Click on *Calculate Segment Counts* at the top-left corner of the page.




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



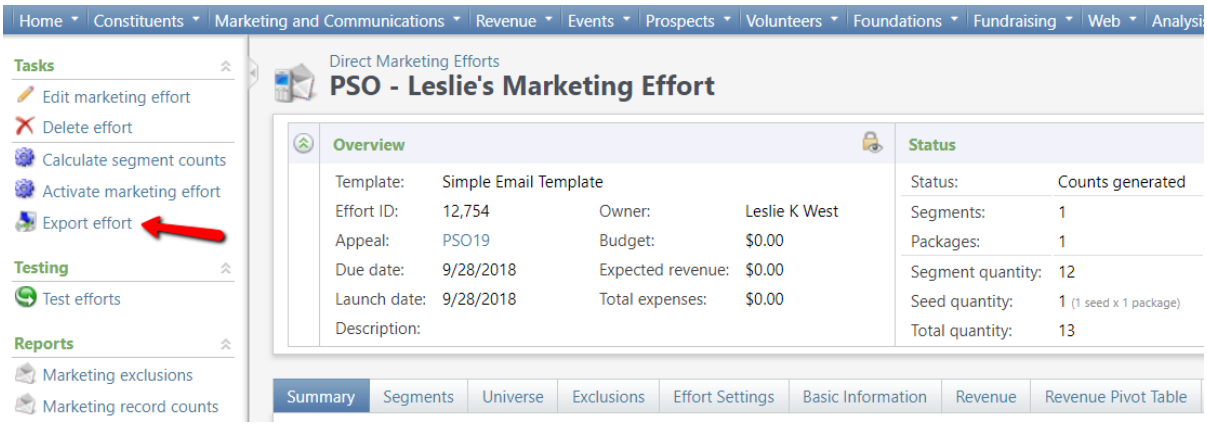
After the process is complete you will see the number of counted records. To return to your marketing effort, click the green "**Go to**" link in the top-left corner of the page.



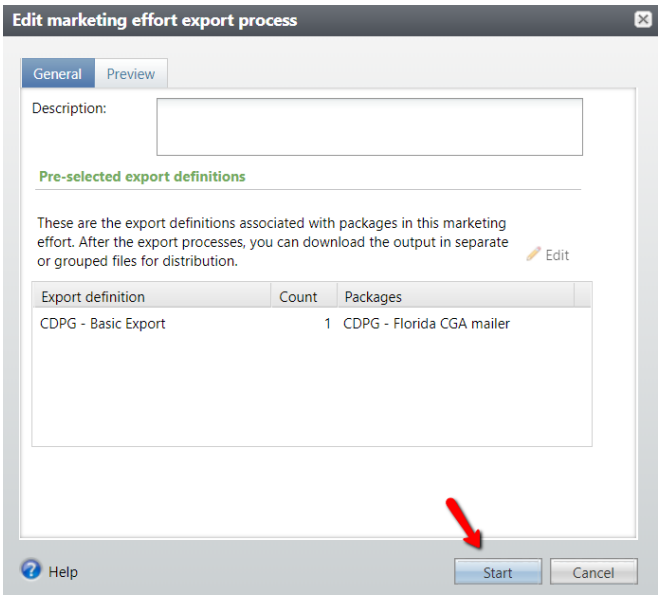

**Important Note:** If you go back to ***Steps 7 or 8*** and make additional changes, you will need to completed ***Step 9*** again and re-calculate your marketing effort.

## Step 10. Export & Send

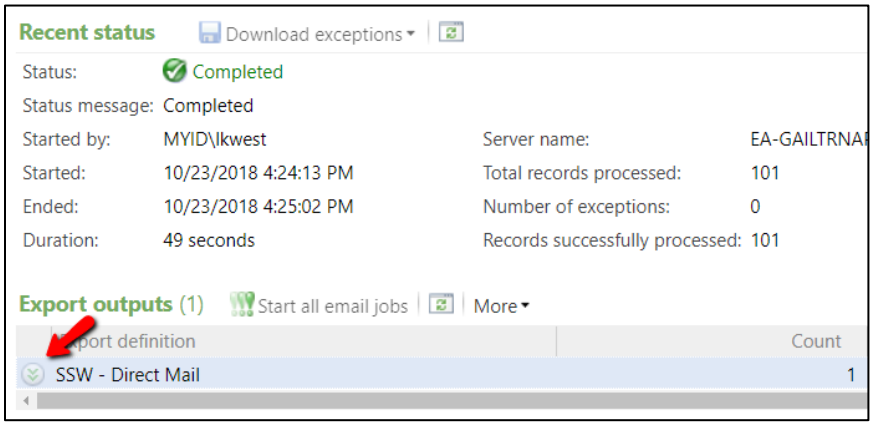
To obtain the spreadsheet for your mailer, you must export your marketing effort by clicking ***Export Effort*** in the top-left corner of your screen.



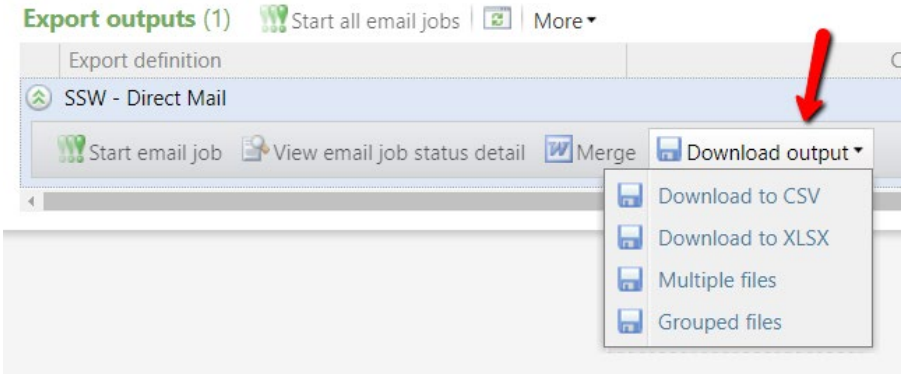
When the new pop-up window appears, click ***Start***.



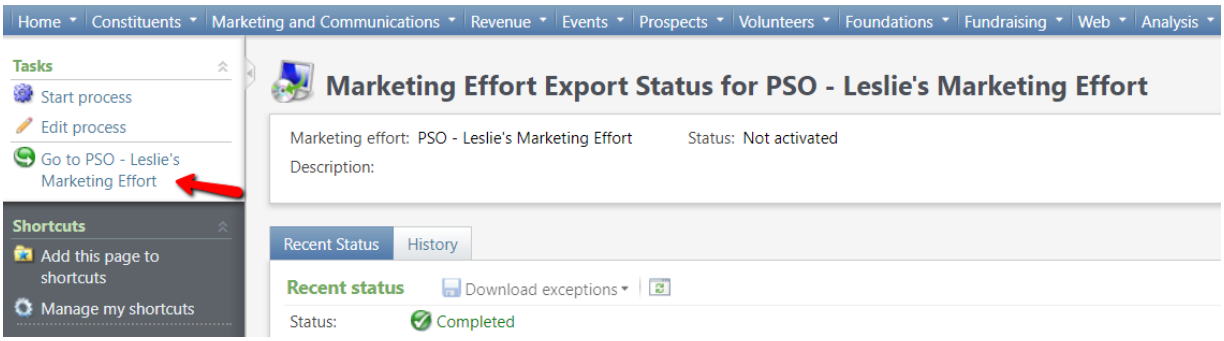

When the export process is complete, click the drop-down arrow under ***Export Outputs***.




Choose **Download output** and then **Download to XLSX**.



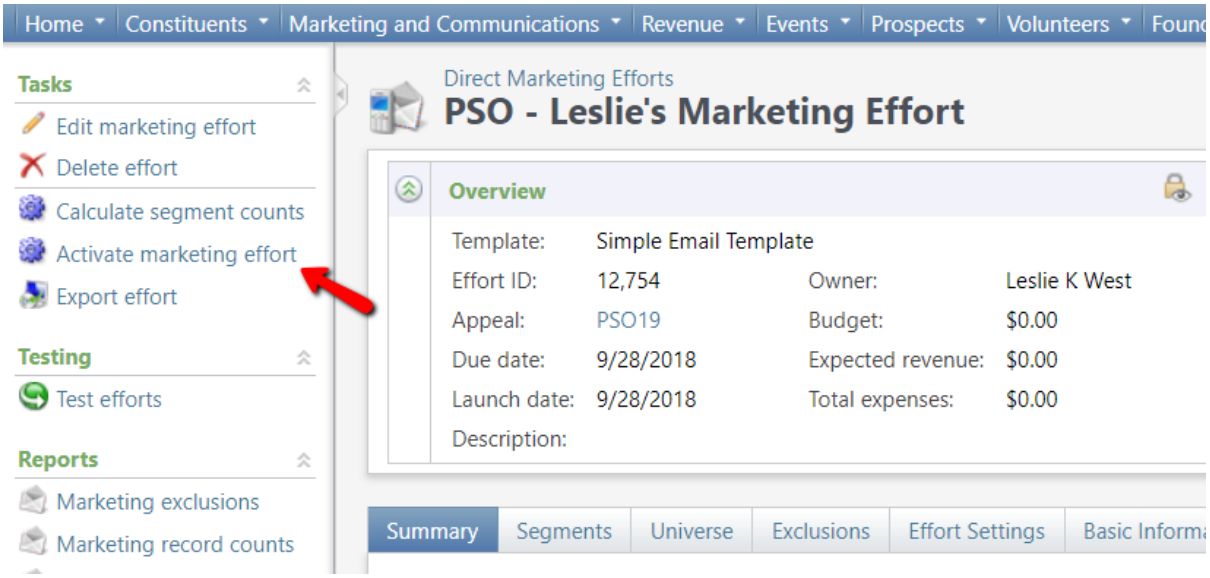
To return to your marketing effort, click the green "**Go to**" link in the top-left corner of the page.



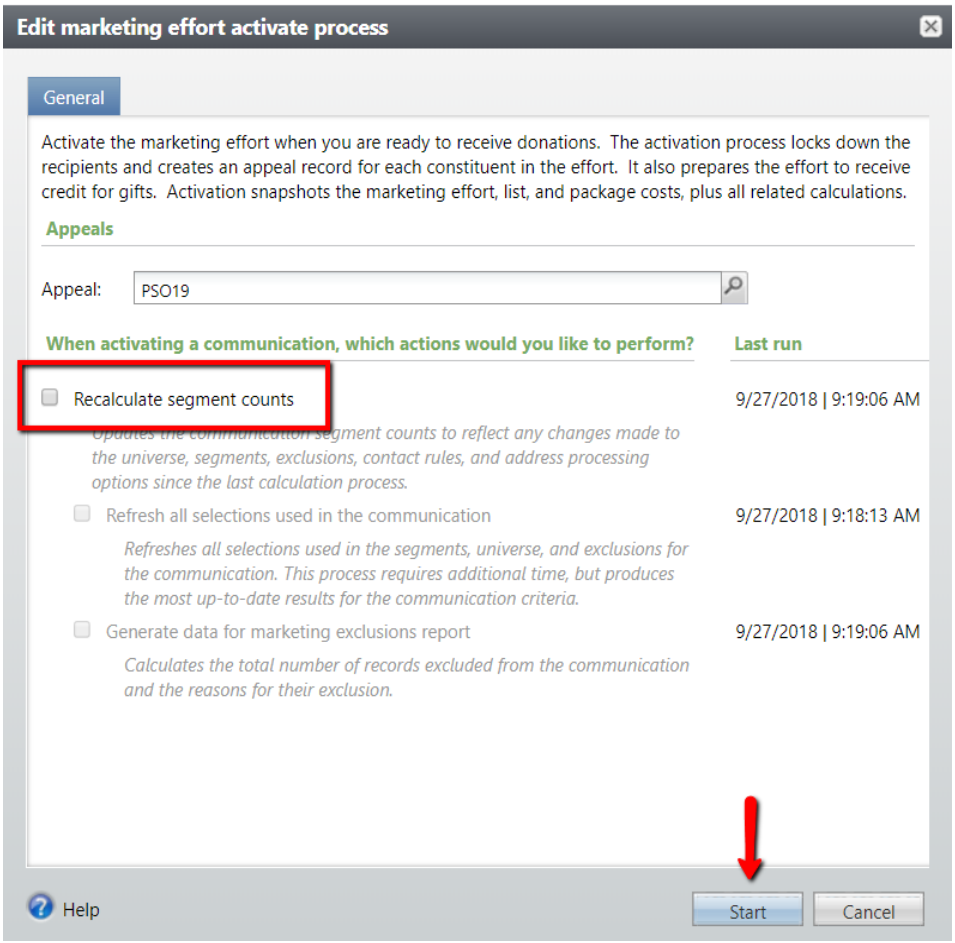

## Step 11. Activate (This is the last step!!)

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.

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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.