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.
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.

![Segments](image)

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.)*

![Image of UI with name and description fields highlighted]

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.

![Image of UI with name, description, site, and category fields highlighted]

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 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.
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*. 

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.

**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.

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.

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.*)
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 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.
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.

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 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 Email specific** to your school/unit. (Ex. *Do Not Email - 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. (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.)*

**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**.

![Image of Calculate segment counts window](image1)

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.

![Image of Marketing Effort Segment Record Count Calculation Status](image2)

**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

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 next to **Email Export Def.**

Choose the option **Start Email Job.**

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.

**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.

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**.