Deliver: Create Mailing



Slate Resources: Deliver

- Deliver Overview (2 minutes)
- <u>Deliver Interface</u> (understanding what all you're seeing when you create a communication)
- <u>New Mailing Details</u> When creating a new communication, this outlines what each text box you're filling out means.
- <u>Adding a Recipient list</u> Outlines how to add a recipient list (both uploaded list and live query). 2 minute read. We will be utilizing an 'imported query'. More to come.
- <u>Send a mailing</u> Touches on all the potential Errors or warnings, and what all the components mean when it comes to sending.
 - <u>Check Logic, Message Preview, and Link Previews</u> (2 minute read) Additional checkpoints to verify the various components of a mailer.
 - <u>Common Mailer Errors</u>



• Navigate to studentsuccess.ua.edu/manage



Home Screen (Successful Login)



Welcome, Jessica.

You have accessed Slate from 1 device in the past 72 hours. Details Your Profile Supervised Login



Deliver: Create Mailer

1. Click 'Deliver' Icon in Primary Menu



2. Select 'New Mailing'







New Mailing Settings

1.

Name: Name the Mailing with appropriate naming convention. The name may be changed at anytime if necessary.

(Termcode- College Abbrev. - Mailer Title)

(Ex. 202410 – EDU – Academic Action)

Folder: Select existing college folder or select 'other' to create new folder. PLEASE keep the folder structure clean and consistent.

User: (leave as default – which should be you)

Realm: Controls access (who can build, run, and edit). Chose your college/department.

Method: Select 'Email (Deliver Designer)'

Template: Select the Template that corresponds with your college or department.

2. Save.

	New Mailin	g		×
	Name		202410 - HES - Not Registered for Fall 2024	
req	Folder		HES ~ / ~	
npaic	User		Anderson, Jessica \checkmark	
it you Realm			Human Environmental Sciences \sim	
	Method		Email (Deliver Designer) \sim	
	Template		\checkmark	·
shov	Opt Out		Gen: Capstone Center for Student Success	~
how	LITM Tracking		Gen: Capstone College of Nursing	Γ.
show			Gen: College of Arts & Sciences	
recor	Hide from Timeline		Gen: College of Education	
cords	S View In Browser		Gen: College of Engineering	
cords	Is		Gen: Communication & Information Science	
cord	1		Gen: Culverhouse College of Business	
how	Save Cancel		Gen: First Year Experience	
how t	hat vou misse	d attendin	Gen: Honors College	
0	acords show t	hat you m	Gen: Human Environmental Sciences	
Our records show that you m			Gen: School of Social Work	

Recipient List

slate	🛤 🚄 🗉 👎	• 🎿 🔳	<u> </u>	¢.	Jessica Anderson
			Student Succ	cess	
<u>All Mailings</u>					
202340 - TES	T - Not Registered for Sp	ring			Edit 🔻
Method Folder	Email				Edit Recipient Lists
User Recipient Lists	Jessica Anderson				Edit Message Header
Current Status Start Date/Time Stop Date/Time	Not Running		Must do	o recipient lis	st before any merge fields can be
Opt Out	Allow Unsubscribe (default)		<mark>used. I</mark>	he merge fiel	lds are determined by query
			exports	and upload	column headings
Sender "St Recipient CC	tudent Success" <studentsuccess@ua.edu< td=""><td>></td><td></td><td></td><td>Send Message</td></studentsuccess@ua.edu<>	>			Send Message
Preheader					
		A	Capstor for Stud	ne Center dent Succes	SS

Edit Recipient List —

(For additional recipient documentation, click the linked heading)

Select 'New Query'

		Jessica Anderson	
	Search	►.	
Student Success			
All Mailings > 202340 - TEST - Not Registered for Spring			
Recipient Lists			
New Query Upload Spreadsheet			
Name Created	Rows	Туре	

Slate (University of Alabama Student Success)

hera1 / lima / alx

Edit Recipient List

Name: (Follow the same naming convention as the deliver mailing.

Termcode – College - Mailer Title

Sharing: (this makes the query sharable for others. Leave unchecked unless you plan to use in another functionality of Slate.)

List Type: (leave as include)

Type: Select 'Templates' as your type.

Base: Select a pre-constructed query with the necessary joins, filters, and exports created by your Institution's Slate Expert.

(Ex. 'Configurable Join - UG Enrollment')

Notes:

*You can still add, remove, and edit exports & filters.

*You must select 'Type' first as it dictates the 'Base' you see.

C Shara au	and with other uppers with the query and query bace permissions
	gry with other users with the query and query base permissions
Include	v

New Query

Name

Sharing

List Type

Type

Base

Edit Recipient List

Query Templates = Pre-populated Query Exports & Filters

that are editable and removable

Exports

CWID	Export	4
Email	🔹 🗇 🗡 🔀 İ Literal	
Preferred-Name	Custom SQL	
Last-Name	Rename Exports	
Mobile		
College		
Cohort Code		

• •

Filters Check Logic Matching Rows: 11,092

Fall 2023 Enrollment = Yes 📲 Exists	🍸 Filter 📑
UG Enrollment / ENR - College IN	SQL
UG Enrollment / ENR - Cohort Code IN	OR
UG Enrollment / UG-ENR - Major IN	NOT
UG Enrollment / ENR - Campus IN	(
)

Edit Recipient List: Filter

CWID	Edit Davt			×	🔲 Export <
CWID Email Preferred-Name Last-Name Mobile College Cohort Code	Edit Part Status Name Source Matching Rows ENR - College Search Show Selected	Inactive ENR - College Filter / UG Enrollment 11,092 IN Academic Affairs Air Force Studies Capstone College of Nur Cellege of Arte & Science	1. Change Status to Active		Export
Filters Check Logic Matching Rows: 11,092 Fall 2023 Enrollment = Yes Exists UG Enrollment / ENR - College IN UG Enrollment / ENR - Cohort Code IN UG Enrollment / UG-ENR - Major IN UG Enrollment / ENR - Campus IN		College of Arts & Science College of Communication College of Education College of Engineering College of Human Enviro Community Health Scien Continuing Studies	es In & Information Sciences Inmental Sciences Ces 2. Select Colle	ge ^r	Filter Custom SQL OR NOT (
Sorts	3. Save	Cancel)

Edit Recipient List: Filter

CWID	Edit Part			×	Export -
Email				^	T Literal
Preferred-Name	Status	Inactive 🗸	1. Change Status		Custom SQL
Last-Name Mobile	Name Source Matching Rows	ENR - Cohort Code Filter / UG Enrollment 11,092	<mark>to Active</mark>		Rename Exports
College	ENR - Conort Code	IN 201940E			
Cohort Code	Show Selected	202040F 202140F			
Filters Check Logic Matching Rows: 11,092		202240F 202340F 202340T ccss_1920 ccss_2021	<mark>2. Select Cohort</mark>		
Fall 2023 Enrollment = Yes 📲 Exists		ccss_2122			T Filter
UG Enrollment / ENR - College IN					Custom SQL
UG Enrollment / ENR - Cohort Code IN					OR
UG Enrollment / UG-ENR - Major IN					NOT
UG Enrollment / ENR - Campus IN					(
)
Sorts	<mark>3. Save</mark>				Sort
To be	Save Delete	Cancel			

Navigate Back to Mailer



Edit Message Body



Edit Message Body



"Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et

delere meanem aliquem queeret voluntatem. Et enim ed minime veniem, quie nestrum evereitationem ullem cornerie sussinit

Double Click on the Dummy Text box. (Will highlight green when you hover).

Edit Message Body

with your messaging

Edit Message

1. Replace Dummy Text

Format

Cohort-Code

College

CWID

Ó

Email

Last-Name

Mobile

Preferred-Name

2. Add merge field (your query exports) where necessary. Be mindful of spaces surrounding the merge field.

tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum Dear {{Preferred-Name}}, dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum." "Lorem ipsum dolor sit ame minim veniam, quis nostrud in voluptate velit esse cillun deserunt mollit anim id est "Sed ut persp quae ab illo in 3. Save aspernatur aut odit Delete Cancel Save est, qui dolorem ipsurri qui qui qui qui a consectetur, adipisci velit, sed qui a non numquam eius modi tempora incidunt ut labore et

"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod

.....

Q 🔄 🖌 👖 💿 Source 🔀

Dear{{Preferred-Name}}, +

<u>U</u> S 🗄 🗄 🚈 🖻 🖻 🖻

- Font - Size - A - A -

Edit Message Body: Button

quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?"

1. Hover Over Button and Double click

SCHEDULE ADVISING APPOINTMENT

Capstone Center for Student Success | Roll Tide

Office of Academic Affairs <u>The University of Alabama</u> Russell Hall 301 Box 870304 Tuscaloosa, AL 35487 Phone <u>205-348-7011</u> | Fax <u>205-348-7012</u> <u>success@ua.edu</u> | <u>success.ua.edu</u> **WHERE LEGENDS ARE MADE** quam nihil

Component

Edit Message Body: Button

elt amet consectetur adinisci velit sed dulla non numquam ellus modi tempora inc	idunt ut lar
Configure Component	×
There are no configuration options for this component.	
S	
To Delete the Button, Press Delete	
save Delete Cancel - To Do Nothing, Press Ca	<mark>ancel</mark>

Edit Message Body: Signature

APPOINTMENT

Capstone Center for Student Success | Roll Tide

Office of Academic Affairs <u>The University of Alabama</u> Russell Hall 301 Box 870304 Tuscaloosa, AL 35487 Phone <u>205-348-7011</u> | Fax <u>205-348-7012</u> <u>success@ua.edu</u> | <u>success.ua.edu</u>



WHERE LEGENDS ARE MADE

 Hover over Signature Section and Double click (will highlight green) 1

Edit Message Body: Signature

veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit **Edit HTML Content** X it fugit n quia = Xh 📋 🖨 👳 🏲 {} if | Q \$\approx 1 | **√** I_x □| 🐼 Source B I U S 1 = := 1 = := = = Format - Size - A - A am qu Font quid e hil Capstone Center for Student Success | Roll Tide ır, vel **1. Edit Signature as Needed** Office of Academic Affairs The University of Alabama Russell Hall 301 Box 870304 Tuscaloosa, AL 35487 Phone 205-348-7011 | Fax 205-348-7012 success@ua.edu | success.ua.edu tudent WHERE LEGENDS ARE MADE airs ima Save Delete Cancel 2. Save 'ax 205-348-7012 ss.ua.edu SENDS ARE MADE

Navigate Back to Mailer



setting, Constant



"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ultamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute inure dolor in reprehendent in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia

Edit Message Header

slate			Basia Anison 📰
		Budget Second	
202340 - TE	ST - Not Registered for Spring		Edit Recipient Lists
Halfood Folder	trust	Click 'Edit Message Hea	Edit Message Header
Unar Recipiert Lans			Edit Message Body
Start Date/Tree			Send Mailing
	Allow (readsorbs (Mfad))		
Henry			Provine Versage
Sender *	Solet Scont' of detacomparate		Intel Wessings
Polyader			== E

Edit Message Header

Sender "Student Success" <studentsuccess@ua.edu> Reply To Recipient 3. Add the Recipient College CC</studentsuccess@ua.edu>	Edit Message He	ader 1. Add Sender		- Doply To	×
	Sender Recipient CC Subject Preheader [j]	"Student Success" <studentsuccess@ua.edu> 3. Add the Recipient ←</studentsuccess@ua.edu>	Reply To	Version 1	Cohort-Code College CWID Email Last-Name Mobile Preferred-Name
5. Save	5. Save	ncel			Ωι

Edit Message Header

This email was sent to kehall6@crimson.ua.edu by "Display Name" <studentsuccess@ua.edu>. Capstone Center for Student Success

be from Student Success.

Unsubscrit

Note: The	sent by in the mailer footer is pulled fro	<mark>om here</mark>					~
cuit message ne			-				^
Sender	"Display Name" <studentsuccess@ua.edu></studentsuccess@ua.edu>	Reply To	"Jessica" <jmande< td=""><td>erson4@ua.edu></td><td></td><td>Cohort-Code</td><td></td></jmande<>	erson4@ua.edu>		Cohort-Code	
Recipient	{{Email}}					College	
СС						CWID	
Subject	Register for Spring!!			Version 1	~	Email	
				Version 1		Last-Name	
Preneader LU						Mobile	
						Preferred-Name	
Save Car	ncel						Û

Creating Mailer Checklist

Recipient List

Upload or New Query

Edit Message Body

Edit Content (don't forget merge fields)

□Keep or Delete Advising Button

Edit Signature (optional)

Edit Message Header

Add Sender & Reply to

□Add Recipient (merge field)

Add Mailer Subject

Check Logic, Message Preview and Link Preview



<u>Check Logic, Message Preview & Link Previews</u>

Preview Message

Send Message



Send Mailing



Send Mailing

<u>Common Pre-Flight Check</u>
 <u>Messages</u>

Check for Errors and Warnings

-Flight Check	Pre-Flight Checks	No errors have been found. Pre-flight checks identify only the most common issues, so please still review your mailing before sending.
	Estimated Recipients	10,325 recipients eligible for immediate delivery.
Verify approximate recipients 1. 202340 - TEST - Not Registered for 202410 (live) - 10,325 recipients		
	Recipient Lists	202340 - TEST - Not Registered for 202410 (live)
	Batch Size (optional)	Send max messages and suspend.
	Review	This message is ready for review.
	Outbox	Send to outbox and do not deliver automatically.
Add a start date and time (eastern time zone)	Ongoing	 Continue running mailing indefinitely.
	Start Date/Time	Time: Eastern Time
	Deduping	Send only one message/recipient \checkmark
	Delay Delivery	 Delay delivery until a specific time.

Send Mailing

Cancel

Save Settings