


How to Send a One-Time Communication in Slate Using Upload Spreadsheet

There are two basic types of Deliver campaigns to consider. One-time and Ongoing. This document will be geared towards One-Time Deliver campaigns. Please see the directions below:

- Click on the Deliver Module at the top of the slate homepage menu

The screenshot shows the Slate homepage dashboard. At the top, there is a navigation bar with the 'slate' logo and several icons representing different modules. A yellow arrow points to the Deliver module icon. Below the navigation bar is a red banner with the text: "You are accessing a TEST ENVIRONMENT of Slate that is for testing purposes only." Below this banner, the user is greeted with "Welcome, Culen." and a message: "You have accessed Slate from 1 computer in the past 72 hours. [Details](#) [Supervised Login](#)". The main content area features a blue banner for "Introducing Slate Launchpad for All" with a registration link. Below this are six social media posts from various users, including @kristlafree, @Technolutions, @TrumanAdmission, @TonisheaJackson, and @Technolutions. The footer contains the text "Technolutions Slate (The University of North Carolina at Chapel Hill)" and "MENA".

- Most of the One-Time Deliver campaigns will use an existing Deliver campaign that has been previously created. You can filter Mailings by using the menu on the left side of the screen. The mailing we will use in this example is located in the "Graduate School" folder in the "Test" "subfolder"


slate  Cullen Wilson Logout


You are accessing a **TEST ENVIRONMENT** of Slate that is for testing purposes only.

Deliver

New Mailing

Summary	Status	Start Date	Updated
Culen's Deliver Test Example Deliver Test Example	In Progress		07/21/2016





Mailings
[Calendar](#)
[Campaigns](#)
[Gateway Inbox](#)
[SMS Inbox](#)

Status
All Mailings
[Running/Ongoing](#)
[Running](#)
[Completed](#)
[In Progress](#)
[Ready for Review](#)

Folders
[All Folders](#)
[Graduate School](#)
[Fee Waiver](#)
Test

[ITR](#)
[MED](#)
[System](#)
[Templates](#)

Exclude archived
[Include archived](#)

Users

- Clicking on the message will bring up the editor. Click on the “Edit Recipient Lists” action item to add your mailing list or lists to your Deliver campaign.

All Mailings

Culen's Deliver Test Example Edit

Method Email
Folder Graduate School / Test
User [Culen Wilson](#)
Recipient Lists
Current Status Not Running
Start Date/Time
Stop Date/Time
Opt Out No Unsubscribe (disregard opt out; transactional mailings only)

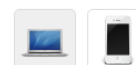


- Edit Recipient Lists
- Edit Message
- Send Mailing
- Copy Mailing

Message

Reply To
Sender "The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>
Recipient {{Email}}
CC culen.test@gmail.com
Subject Deliver Test Example

- Display Sample Message
- Send Test Message



Hello {{First}},
This is a test of the deliver module. I hear your favorite is {{Color}}. Your email address is {{Email}}.
Thank you.
The University of North Carolina

- You will see two options for adding recipient data: "New Query" and "Upload Spreadsheet".
 - Click "Upload Spreadsheet"
 - Please see the "How to Create a Query" documentation to view how to use queries to populate merge fields in your mailings

All Mailings > Culen's Deliver Test Example

Recipient Lists

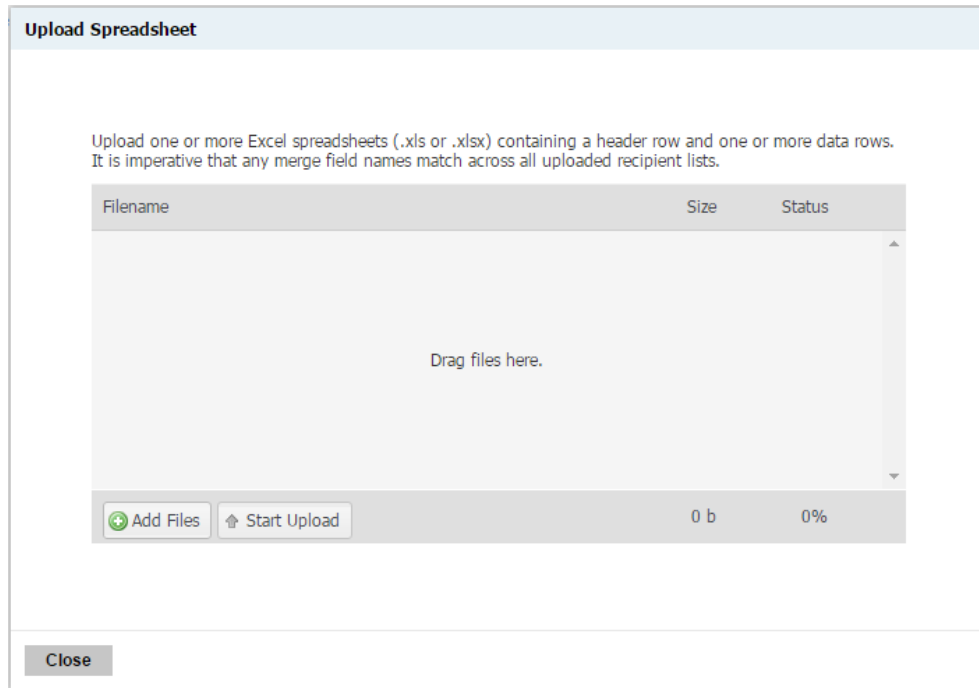
New Query Upload Spreadsheet

Name	Created	Rows	Type
------	---------	------	------

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- Click add file and use the open file dialog to navigate to the file you would like you use. You will see the filename, size of the file, and percent uploaded appear once the file has been chosen.





- Click the “Start Upload” button. After uploading you will see a new row appear in your Recipient Lists screen.

Upload Spreadsheet



Upload one or more Excel spreadsheets (.xls or .xlsx) containing a header row and one or more data rows. It is imperative that any merge field names match across all uploaded recipient lists.

Filename	Size	Status
Deliver Test Example.xlsx	9 kb	0% 


 Add Files  Start Upload

9 kb 0%

Close

- You can click this new row in the list to edit whether you would like this list to include applicants in the mailing or suppress them from receiving a mailing. (Suppression lists are usually used with a live query and continuous mailings). You will also see all of the Merge Fields that are included from the spreadsheet you have uploaded.

slate  Cullen Wilson [Logout](#)

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[All Mailings](#) > [Deliver Test Example](#)

Recipient Lists

[New Query](#) [Upload Spreadsheet](#)

Name	Created	Rows	Type
Deliver Test Example	07/20/2016 09:53 AM	9	Include

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Edit Recipient List

Name: Deliver Test Example

Created: 07/20/2016

Row Count: 9

List Type:

Merge Fields: Color, Email, First



Make it Match!

If you populate your recipients using multiple lists, it is important that your export fields match. For example, if one of your lists built from a Live Query uses the following exports:

Email	First	Middle	Last	Prefix	Suffix
Contact	Name	Name	Name	Name	Name

then additional live queries must contain the same exports and any uploaded spreadsheets must have matching headers:

Email	First	Middle	Last	Prefix	Suffix
ahamil@email.com	Alexander	Stephens	Hamilton	Mr.	III
gwash@email.com	George	Grant	Washington	Mr.	

- Now you are almost ready to send. Before you do, you can click the “Edit Message” action item to view the message and make any edits before sending. You will also see the merge fields you uploaded appear in the top right. Clicking on these will place a merge field placeholder wherever you cursor is active. Click “Save” to save your changes

Edit Message

Reply To (opt.)

Sender "The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>

Recipient {{Email}}

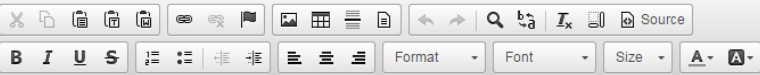
CC culen.test@gmail.com













Subject Deliver Test Example

Color

Email

First



B I U S |  |  |  |  |  |  |  |  |  |  |  | 

Hello {{First}},

This is a test of the deliver module. I hear your favorite is {{Color}}. Your email address is {{Email}}.

Thank you.

The University of North Carolina

[Edit Attachments](#)

- Now each time you click the “Display Sample Message” you will see your message with these merge fields populated by the information you loaded from your Spreadsheet.

All Mailings

Culen's Deliver Test Example

Edit

Method	Email
Folder	Graduate School / Test
User	Culen Wilson
Recipient Lists	Deliver Test Example (9 records uploaded 07/21/2016 11:01 AM)
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	No Unsubscribe (disregard opt out; transactional mailings only)

- Edit Recipient Lists
- Edit Message
- Send Mailing
- Copy Mailing

Message

Reply To	
Sender	"The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>
Recipient	culen.test+g@gmail.com
CC	culen.test@gmail.com
Subject	Deliver Test Example



- Display Sample Message
- Send Test Message




Hello Bob,

This is a test of the deliver module. I hear your favorite is Violet. Your email address is culen.test+g@gmail.com.

Thank you,

The University of North Carolina

- You can send a copy of this sample message to your own email account before starting the mailing by clicking the "Send Test Message" button. A prompt will appear asking for a destination email. The prompt will default populate with your email from SLATE

slate  Culen Wilson L Search...

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All Mailings

Deliver Test Example

Method	Email
Folder	Graduate School
User	Culen Wilson
Recipient Lists	Deliver Test Example (9 records uploaded 07/20/2016 9:53 AM)
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	Allow Unsubscribe (default)

Message

Reply To	
Sender	"The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>
Recipient	culen.test+c@gmail.com
CC	culen.test@gmail.com
Subject	Deliver Test Example

Hello Nancy,

This is a test of the deliver module. If you are receiving this email, you are on the list.

Thank you,

The University of North Carolina

[Unsubscribe](#) from The University of North Carolina at Chapel Hill


Send Test

Email

Send Test **Cancel**

Deliver Test Example

- Edit Recipient Lists
- Edit Message
- Send Mailing
- Copy Mailing
- Display Sample Message
- Send Test Message



- Click "Send Mailing" and completed the dialog that appears below

Send Mailing

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 Upon clicking Send Mailing, the following actions will be taken:

32 records will be considered for immediate delivery.
14 records will be excluded as a result of suppression lists.

The recipient count is determined from the following lists:

1. Deliver Test Example - 9 records

Recipient Lists Deliver Test Example (9 records uploaded 07/21/2016 11:01 AM)

Batch Size (optional) Send max messages and suspend.

Deduping Send only one message/recipient.

Ongoing Continue running mailing indefinitely

Start Date/Time Time:

Click the Send Mailing button when you are ready to activate the mailing.

You can save your settings without sending.

Slate will check your mailing to make certain you have some important elements. For example, Slate will tell you if you forgot to add the Recipient field to your message.

Review your Recipient and Suppression lists. Slate will summarize the expected delivery report prior to sending.

Include a batch size. For example, if you entered 10 your mailing would stop after sending to 10 random records from your recipient list(s).

Sometimes numerous recipient lists will include the same record. Click this box to ensure that only one message is sent per email address.

Important: Leave this box unchecked if this is a one-time mailing.

Optional: Schedule a start date and time for your one-time mailing. If you want to send your mailing immediately, leave these fields blank.

Upload Dataset Table Used in Example

Email	First	Color
culen.test+a@gmail.com	Julie	Red
culen.test+b@gmail.com	Joe	Orange
culen.test+c@gmail.com	Nancy	Yellow
culen.test+d@gmail.com	Mihaela	Green
culen.test+e@gmail.com	Jeroen	Blue
culen.test+f@gmail.com	Culen	Indigo
culen.test+g@gmail.com	Bob	Violet
culen.test+h@gmail.com	Jim	Red
culen.test+i@gmail.com	Mary	Orange