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

- 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

- 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.

- 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

- 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.

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

Drag files here.

⊕ Add Files ⬆ Start Upload   0 b   0%

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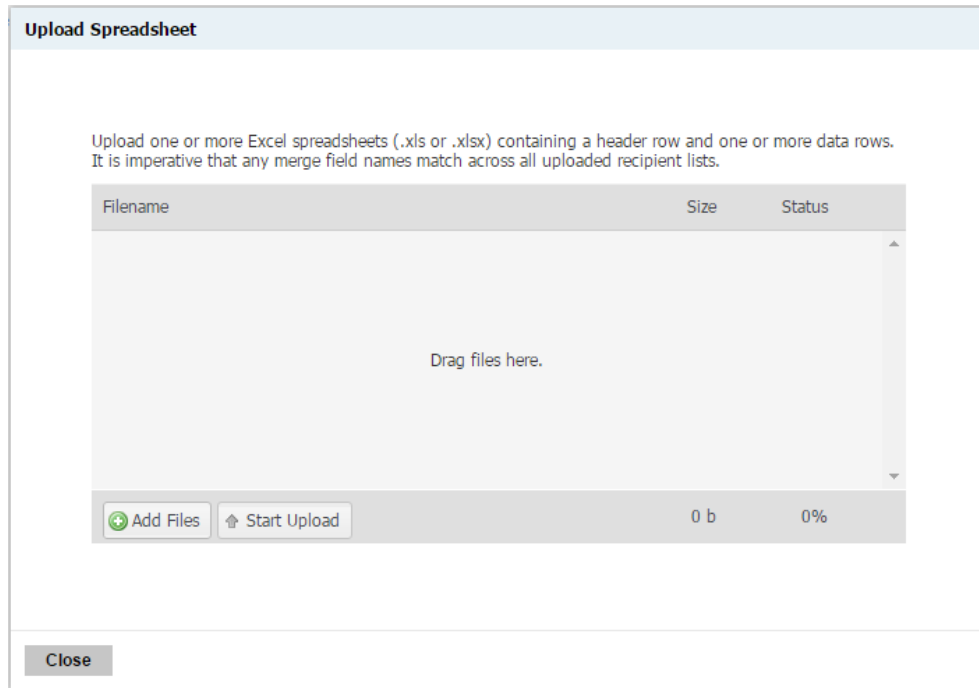
- Click the "Start Upload" button. After uploading you will see a new row appear in your Recipient Lists screen.

- 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.

Edit Recipient List

Name	Deliver Test Example
Created	07/20/2016
Row Count	9
List Type	Include ▼
Merge Fields	Color
	Email
	First

Save   Delete   Cancel

⚠ **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

- 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.

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

Display Sample Message

Send Test 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
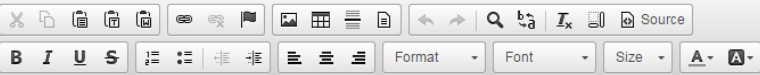
Hello Bob,

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

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)

Edit Recipient Lists
Edit Message
Send Mailing
Copy Mailing

Message

Display Sample Message
Send Test Message

Reply To	
Sender	"The University of N
Recipient	culen.test+c@gmail.
CC	culen.test@gmail.co
Subject	Deliver Test Example

Send Test

Email: culenw@email.unc.edu

Send Test   Cancel

Hello Nancy,

This is a test of the deliver module. I ....c@gmail.com.

Thank you,

The University of North Carolina

This email was sent to culen.test+c@gmail.com by "The University of North Carolina at Chapel Hill"
<UNCCH_Admissions@unc.edu>.
Unsubscribe from The University of North Carolina at Chapel Hill.

- 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.

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.

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

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

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

Batch Size (optional) — Send max [ ] messages and suspend.

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).

Deduping — ☐ Send only one message/recipient.

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

Ongoing — ☐ Continue running mailing indefinitely

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

Start Date/Time — [ ] Time: [ ]

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

Send Mailing | **Save Settings** | **Cancel**

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

You can save your settings without sending.

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