

How to Export Query Results into a Deliver Mailing

Log in to the back-end of SLATE by <https://applynow.unc.edu/manage> using your onyen and password

Welcome, Culen. You have accessed Slate from 1 computer in the past 72 hours. [Details](#) [Supervised Logir](#)

Slate Webinar Series | Wednesday, August 17 at 2:00pm Eastern Time: Road Warriors: Tips and Tricks on Travel and Trips
Join us to learn more about best practices in Trips, utilizing Upcoming Event filters in communications, and translating your travel plans into a cohesive strategy within Slate. [Register here to attend.](#)

@Rob_Galarza
We made it! Slate is LIVE at @DePaulU. Here we go... @Technolutions
Posted 1 hour ago

@rebeccampopelka
@Technolutions just finished our last pre-launch Slate training at DePaul. Excited for Monday!
Posted on 12 Aug

slate @Technolutions
🍁(8/17) - Register on your homepage! "Road Warriors: Tips and Tricks for Travel and Trips" -Pumpkin-spiced lattes optional but encouraged🍁
Posted on 12 Aug

@the_schneids_1
@Technolutions Thank you Slate for making our lives easier! Nothing better than logging on to #Slate on a Thursday afternoon! #SlateLove
Posted on 11 Aug

slate @Technolutions
A little bit of @LawrenceTechU love this week! So great to have part of the team with us in New Haven this week!
Posted on 11 Aug

slate @Technolutions
You've earned it! 🍌 #SlateLaunchpad crew from @PomonaAdmit @CMCNews @PengAdmissions @BatesAdmission
Posted on 11 Aug

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Click the  Queries/Reports button on the top menu bar

Queries

New Query Quick Query

Name	Folder	Population	Updated
Dashboard	System	Applications	08/12/2016
Dashboard	System	Applications	08/14/2016
Dashboard	System	Prospects	08/03/2016
General Admissions Report	General Admissions	Applications	08/05/2016
General Admissions Report, simplified	General Admissions	Applications	08/05/2016
GRADProcessing - BH INC	Reader	Read by Major	07/26/2016
GRADProcessing Deny - BH	Reader	Read by Major	07/26/2016
GRADProcessing-BH	Reader	Read by Major	07/26/2016
GRADProcessing-CH	Reader	Read by Major	07/26/2016
GRADProcessing-ISSS	Reader	Read by Major	07/26/2016
GRADProcessing-JL	Reader	Read by Major	07/26/2016
GRADProcessing-ML	Reader	Read by Major	07/26/2016
GRADProcessing-MT	Reader	Read by Major	07/26/2016
GRADProcessing-SOG	Reader	Read by Major	07/26/2016
MergePublic	System	Applications	08/01/2016

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Click the 'New Query' bar at the top left of the page. This will bring up a prompt to name your new query and place it in a folder. Select 'Applications' as the population.

How to Export Query Results into a Deliver Mailing

New Query

Name

User

Sharing Share query with other users with the query and query base permissions

Folder

Population

You will be brought to the edit query page. Here you will added the exports and filters to your query to pull any fields that you would like to be used in the mailing. (Please reference the SLATE Query documentation if you require more information on query functionality) Typically a query that will be used for a mailing will include the export fields Name, Email, Degree, and Major. Be sure to add filters to narrow down and restrict the population you would like to contact.

How to Export Query Results into a Deliver Mailing

slate Culen Wilson Log out Search...

All Queries > Test Query

Edit Query

Folder	
User	Culen Wilson
Population	Applications
Execution Mode	Retrieve all records each time query is run

- Edit Properties
- Edit Web Service
- Sharing Permissions
- Schedule Export
- Preview Results
- Display SQL
- Save Copy

Exports

Name	Export
Email	Custom SQL
Degree	Literal
Major	Existence

Filters Estimated Rows: 2

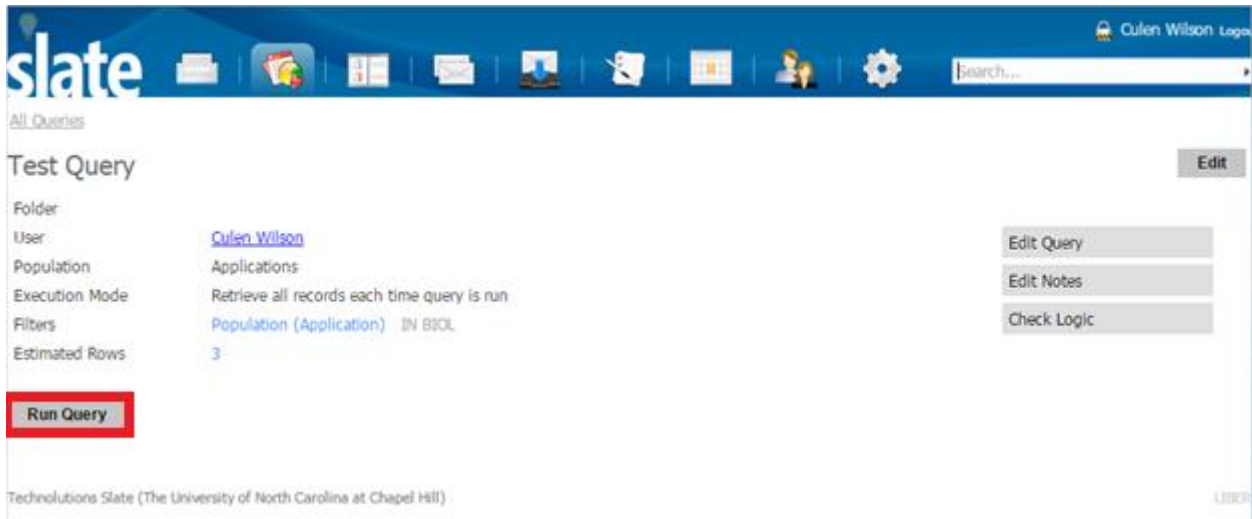
Population (Application)	IN CHEM	Filter
Degree	IN Master of Science	Custom SQL
		OR
		NOT
		(
)

Sort Keys

- Sort Key

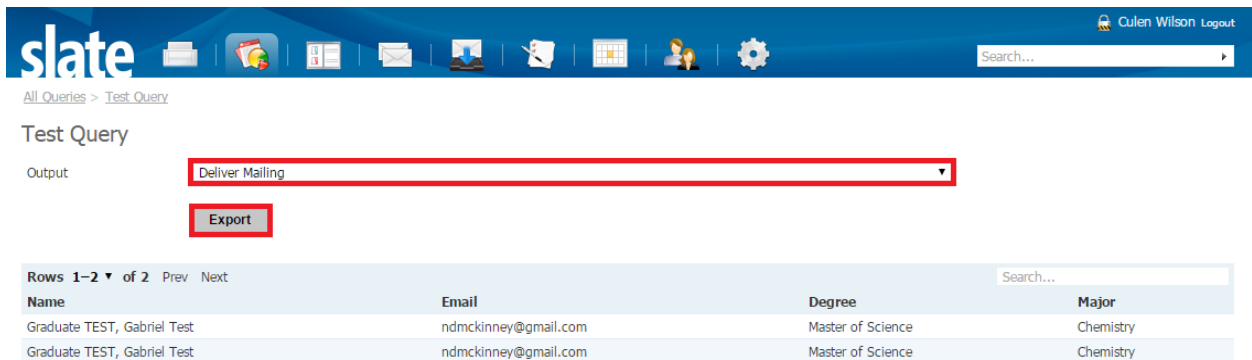
Once you have applied the exports and filters, it will be time to run the query. Go back to the Query page in SLATE and select the query name you have just created from the list below. Then click 'Run Query'

How to Export Query Results into a Deliver Mailing



The screenshot shows the Slate interface for a query named 'Test Query'. The user is Cullen Wilson. The query configuration includes: Folder (empty), User (Cullen Wilson), Population (Applications), Execution Mode (Retrieve all records each time query is run), Filters (Population (Application) IN BSQL), and Estimated Rows (3). A red box highlights the 'Run Query' button. On the right, there are buttons for 'Edit Query', 'Edit Notes', and 'Check Logic'. The footer indicates 'Technolutions Slate (The University of North Carolina at Chapel Hill)'.

Once the query has run, you will be prompted to export your results. Here you will select the Output as 'Deliver Mailing'



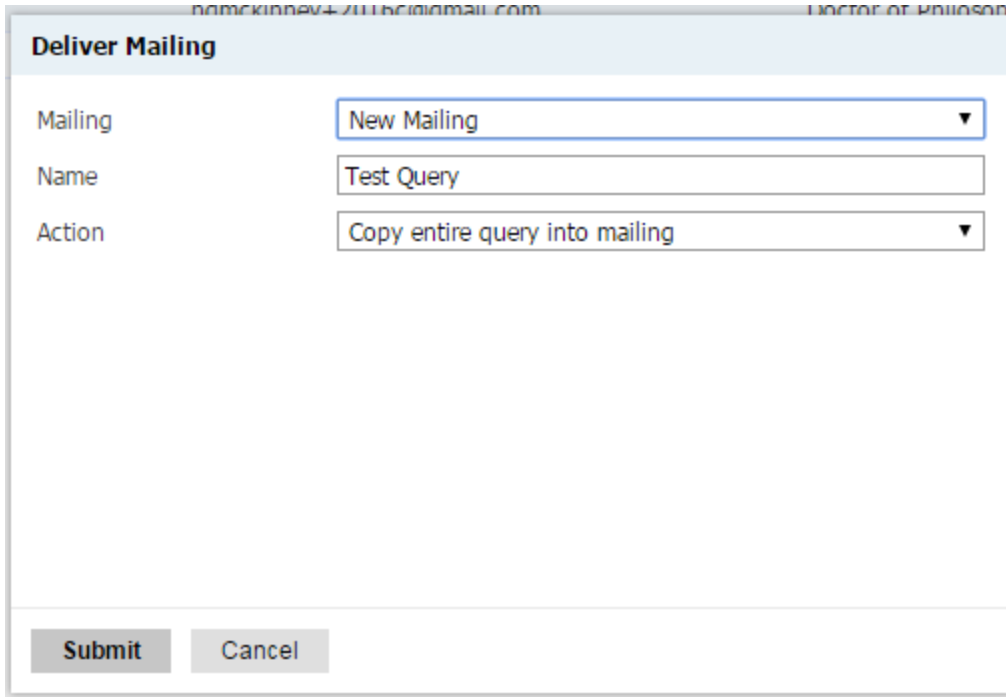
The screenshot shows the Slate interface for the 'Test Query' results. The 'Output' dropdown menu is set to 'Deliver Mailing' and is highlighted with a red box. Below it, the 'Export' button is also highlighted with a red box. The results table shows two rows of data:

Name	Email	Degree	Major
Graduate TEST, Gabriel Test	ndmckinney@gmail.com	Master of Science	Chemistry
Graduate TEST, Gabriel Test	ndmckinney@gmail.com	Master of Science	Chemistry

The table also includes a search bar and pagination controls (Rows 1-2 of 2, Prev, Next).

You will then be prompted to either create a new mailing or to use an existing mailing. We will be creating a new mailing in this example. You will also be prompted to either use the query you have created as the new query for the deliver campaign, which is used for on-going deliver campaigns, or to 'Copy results into mailing as static recipient list', which is better for one-time communications.

How to Export Query Results into a Deliver Mailing

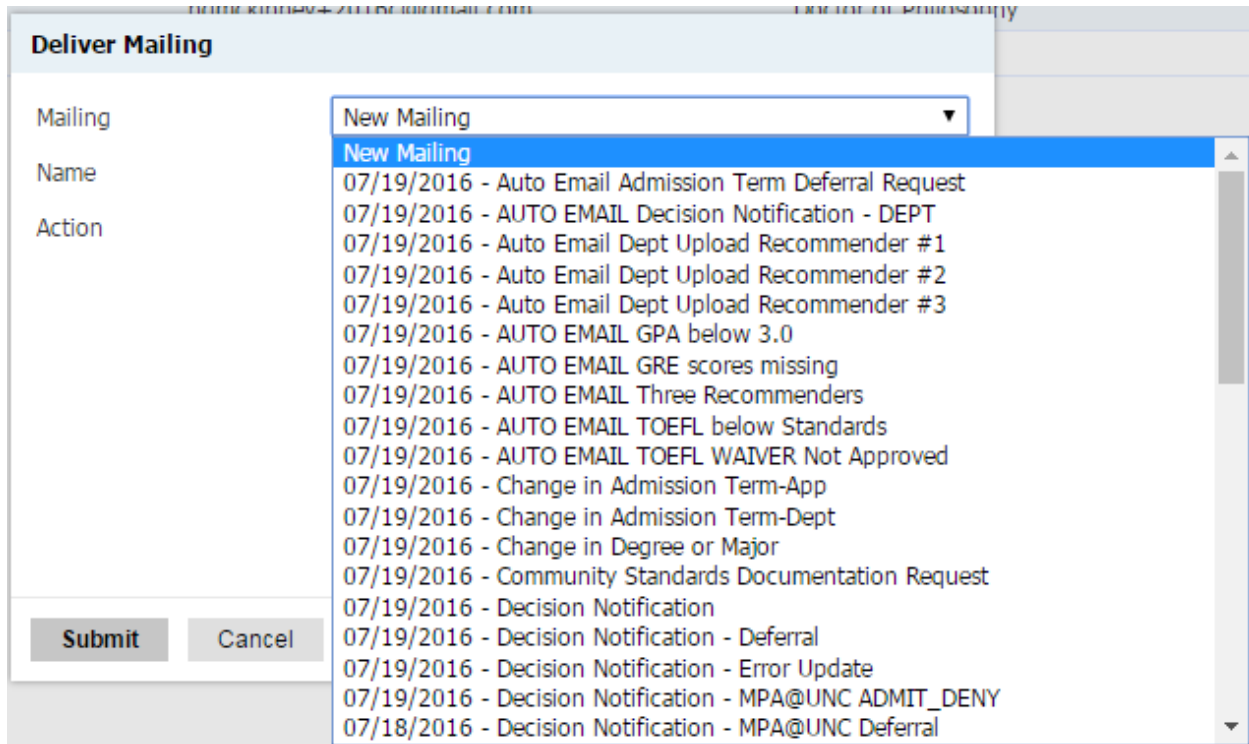


Deliver Mailing

Mailing:

Name:

Action:



Deliver Mailing

Mailing:

Name:

Action:

- 07/19/2016 - Auto Email Admission Term Deferral Request
- 07/19/2016 - AUTO EMAIL Decision Notification - DEPT
- 07/19/2016 - Auto Email Dept Upload Recommender #1
- 07/19/2016 - Auto Email Dept Upload Recommender #2
- 07/19/2016 - Auto Email Dept Upload Recommender #3
- 07/19/2016 - AUTO EMAIL GPA below 3.0
- 07/19/2016 - AUTO EMAIL GRE scores missing
- 07/19/2016 - AUTO EMAIL Three Recommenders
- 07/19/2016 - AUTO EMAIL TOEFL below Standards
- 07/19/2016 - AUTO EMAIL TOEFL WAIVER Not Approved
- 07/19/2016 - Change in Admission Term-App
- 07/19/2016 - Change in Admission Term-Dept
- 07/19/2016 - Change in Degree or Major
- 07/19/2016 - Community Standards Documentation Request
- 07/19/2016 - Decision Notification
- 07/19/2016 - Decision Notification - Deferral
- 07/19/2016 - Decision Notification - Error Update
- 07/19/2016 - Decision Notification - MPA@UNC ADMIT_DENY
- 07/18/2016 - Decision Notification - MPA@UNC Deferral

After clicking submit you will be brought into the message editing screen. Here you can customize your message before you send it out to your recipient list

How to Export Query Results into a Deliver Mailing

The screenshot displays the Slate email marketing interface. At the top, there is a navigation bar with the 'slate' logo, a search bar, and a user profile for 'Culen Wilson'. Below the navigation bar, the main content area is titled 'Test Query' and includes a list of configuration details:

- Method: Email
- Folder:
- User: [Culen Wilson](#)
- Recipient Lists: Test Query (2 records uploaded 08/15/2016 10:16 AM)
- Current Status: Not Running
- Start Date/Time:
- Stop Date/Time:
- Opt Out: No Unsubscribe (disregard opt out; transactional mailings only)

To the right of these details are several action buttons: 'Edit Recipient Lists', 'Edit Message', 'Send Mailing', and 'Copy Mailing'. Below the configuration details is a 'Message' section with the following fields:

- Reply To:
- Sender: "The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>
- Recipient: ndmckinney@gmail.com
- CC:
- Subject: Greetings from UNC

Below the message fields is a preview of the email content:

Hello Graduate TEST, Gabriel Test,

I hope you are enjoying classes in Chemistry for your Master of Science.

Regards,
Rameses Ram

At the bottom right of the message preview area, there are two device icons: a laptop and a smartphone.

Click the 'Edit Message' button to bring up the email message editor.

How to Export Query Results into a Deliver Mailing

The screenshot shows the Slate email marketing interface. At the top, there is a blue header with the 'slate' logo and a search bar. Below the header, the page is titled 'Test Query'. The main content area is divided into two sections: 'Message' and 'Message'. The 'Message' section shows details for a test query, including the method (Email), folder, user (Culen Wilson), recipient lists (Test Query), current status (Not Running), start and stop dates, and opt-out settings. The 'Message' section shows the email content, including the sender (The University of North Carolina at Chapel Hill), recipient (ndmckinney@gmail.com), and subject (Greetings from UNC). The email content reads: 'Hello Graduate TEST, Gabriel Test. I hope you are enjoying classes in Chemistry for your Master of Science. Regards, Rameses Ram'. On the right side of the page, there is a vertical menu with buttons for 'Edit Recipient Lists', 'Edit Message' (highlighted with a red box), 'Send Mailing', 'Copy Mailing', 'Display Sample Message', and 'Send Test Message'.

The editor functions just like and other WYSIWYG editor. On the right menu of the editor you can click the fields you would like included in your message and they will be output at your cursors location. These merge fields are surrounded by curly braces `{{}}` and will be replaced based by the values provided by your query once the message has been sent.

How to Export Query Results into a Deliver Mailing

The screenshot shows an 'Edit Message' interface. On the left, there are fields for 'Reply To (opt.)', 'Sender' (The University of North Carolina at Chapel Hill <UNCCH_Admissions@unc.edu>), 'Recipient' ({{Email}}), 'CC', and 'Subject' (Greetings from UNC). Below these is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and source. The text in the editor reads: 'Hello {{Name}}. I hope you are enjoying classes in {{Major}} for your {{Degree}}. Regards, Rameses Ram'. At the bottom left are 'Save' and 'Cancel' buttons. At the bottom right is a blue link 'Edit Attachments'. On the right side of the form, a red box highlights a vertical list of fields: 'a-id', 'Degree', 'Email', 'Major', 'Name', and 'p-id'.

Once you are done editing, you can view an example of what your message will look like by clicking the 'Display Sample Message' button in the right menu.

How to Export Query Results into a Deliver Mailing

The screenshot shows the SLATE interface for configuring a mailing. The top navigation bar includes the SLATE logo, a search bar, and user information (Culen Wilson). Below the navigation bar, the page title is "Test Query".

The main content area is divided into two sections:

- Metadata Table:** A table with the following rows:

Method	Email
Folder	
User	Culen Wilson
Recipient Lists	Test Query (2 records uploaded 08/15/2016 10:16 AM)
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	No Unsubscribe (disregard opt out; transactional mailings only)
- Message Preview:** A section titled "Message" showing the following details:

Reply To	
Sender	"The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>
Recipient	ndmckinney@gmail.com
CC	
Subject	Greetings from UNC

On the right side of the page, there is a vertical list of action buttons: "Edit Recipient Lists", "Edit Message", "Send Mailing", "Copy Mailing", "Display Sample Message" (highlighted with a red box), and "Send Test Message". At the bottom right, there are icons for a laptop and a smartphone.

The message preview content is as follows:
Hello Graduate TEST, Gabriel Test.

I hope you are enjoying classes in Chemistry for your Master of Science.

Regards,
Rameses Ram

You may also send a test message to any email account by clicking the 'Send Test Message' button. This will prompt you to provide an email address to send to, but will default to the email SLATE has on your profile.

How to Export Query Results into a Deliver Mailing

The screenshot shows the Slate email marketing interface. At the top, there is a navigation bar with the 'slate' logo and a search bar. Below the navigation bar, the 'Test Query' mailing is displayed. The mailing details include:

- Method: Email
- Folder: (empty)
- User: Cullen Wilson
- Recipient Lists: Test Query (2 records uploaded 08/15/2016 10:16 AM)
- Current Status: Not Running
- Start Date/Time: (empty)
- Stop Date/Time: (empty)
- Opt Out: No Unsubscribe (disregard opt out; transactional mailings only)

On the right side, there is a menu with the following options:

- Edit Recipient Lists
- Edit Message
- Send Mailing
- Copy Mailing
- Display Sample Message
- Send Test Message** (highlighted with a red box)

Below the mailing details, the message content is displayed:

Reply To: (empty)
Sender: "The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>
Recipient: ndmckinney@gmail.com
CC: (empty)
Subject: Greetings from UNC

The message content is:

Hello Graduate TEST, Gabriel Test,
I hope you are enjoying classes in Chemistry for your Master of Science.
Regards,
Rameses Ram

The 'Send Test' dialog box is shown. It has a title bar that says 'Send Test'. Below the title bar, there is an 'Email' label and a text input field containing the email address 'culenw@email.unc.edu'. At the bottom of the dialog box, there are two buttons: 'Send Test' and 'Cancel'.

Once you are ready to send your message, clicking the 'Send Message' button in the right menu. See the diagram below for details on sending your mailing out.

How to Export Query Results into a Deliver Mailing

The screenshot shows the Slate email marketing interface. At the top, there is a navigation bar with the 'slate' logo, a search bar, and a user profile for 'Culen Wilson'. Below the navigation bar, the page title is 'All Mailings' and the specific mailing is titled 'Test Query'. The mailing details are as follows:

Method	Email
Folder	
User	Culen Wilson
Recipient Lists	Test Query (2 records uploaded 08/15/2016 10:16 AM)
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	No Unsubscribe (disregard opt out; transactional mailings only)

On the right side of the interface, there are several action buttons: 'Edit Recipient Lists', 'Edit Message', 'Send Mailing' (highlighted with a red box), and 'Copy Mailing'. Below these buttons are 'Display Sample Message' and 'Send Test Message'.

The 'Message' section shows the following details:

Reply To	
Sender	"The University of North Carolina at Chapel Hill" <UNCCH_Admissions@unc.edu>
Recipient	ndmckinney@gmail.com
CC	
Subject	Greetings from UNC

At the bottom of the interface, there are icons for a laptop and a smartphone. The email content is displayed in a large text area:

Hello Graduate TEST, Gabriel Test.

I hope you are enjoying classes in Chemistry for your Master of Science.

Regards,
Rameses Ram

How to Export Query Results into a Deliver Mailing

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:

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.

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

You can save your settings without sending.