

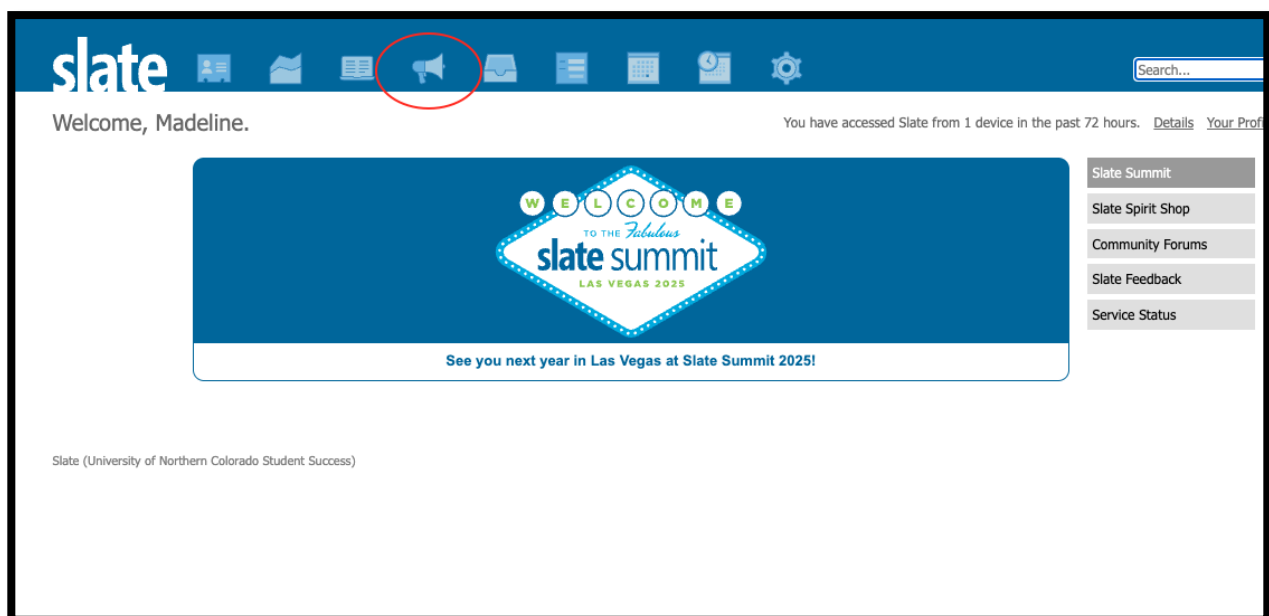
Five Steps for Creating an Email in Slate – Slate Cheat Sheet

NOTE:

Users must submit their request for email distribution through the [marketing request form](#) **at least 2 business days prior** to the desired distribution. If there are edits, the review process may take longer. You will receive a confirmation email from Central Marketing and Communications once your email has been reviewed and scheduled.

STEP 1: Create a New Mailing:

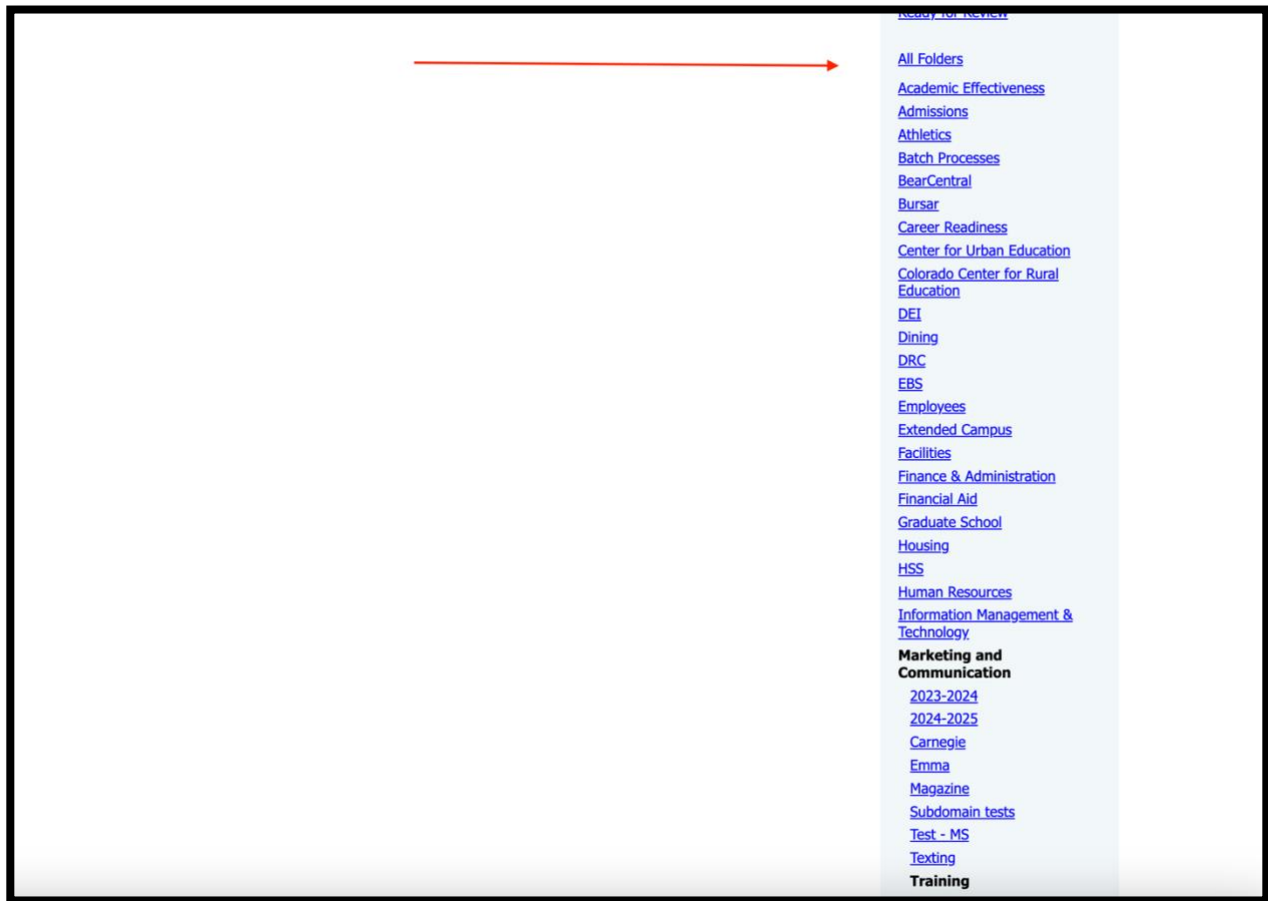
- Navigate to **Deliver** (megaphone icon at the top), click on the **megaphone icon** or the **Mailings** dropdown



To create a new mailing, you can either click “**New Mailing**” OR you can **copy from an existing template**:

To **copy from an existing template**:

- Navigate to your unit's designated folder on the right-hand side:



- Once you are in your folder, click the mailing where the first word is “TEMPLATE”

The screenshot shows the Slate email marketing dashboard. At the top, there's a blue header with the 'slate' logo and various icons. Below the header, the main area is titled 'Deliver' and contains a 'New Mailing' button. A search bar labeled 'Search Mailings...' is also present. The central part of the dashboard is a table with columns: Status, Name, Method, Sender, Start Date, Updated, Message Mailing Subfolder, Message Mailing Sender, and User Full Name. A single row is visible with the name 'TEMPLATE-MARC...' circled in red. To the right of the table, there's a sidebar with links for 'Mailings' (Calendar, Campaigns, Outreach, Outbox, Library, Content Blocks, Designer, Gateway Inbox, SMS Inbox), 'Status' (All Mailings, Running/Ongoing, Running, Scheduled, Completed, In Progress, Ready for Review), and 'All Folders' (Academic Effectiveness, Admissions, Athletics, Batch Processes, BearCentral, Bursar, Career Readiness, Center for Urban Education, Colorado Center for Rural Education, DEI, Dining, DRC, EBS).

Status	Name	Method	Sender	Start Date	Updated	Message Mailing Subfolder	Message Mailing Sender	User Full Name
In Progress	TEMPLATE-MARC...	Email	*UNC Marketing ...		08/23/2024	Training	*UNC Marketing ...	Madeline Smith

Click the dropdown arrow next to “Edit” and select **Copy Mailing**. Name your mailing following the naming convention explained in Step 1A, then click “Save.”

All Mailings

TEMPLATE-MARCOM-2024-Template-Basic-w/Hero-1CTA

Method	Email
Folder	Marketing and Communication / Training
User	Madeline Smith
Realm	0 - Office: Marketing and Communications (MARCOMM)
Recipient Lists	
Current Status	Not Running
Timing	Send upon activation
Opt Out	No Unsubscribe (disregard opt out; transactional mailings only)

Edit

Edit Mailing

Copy Mailing

Snapshots

Edit Recipient Lists

Edit Message

Send Mailing

Preview Message


Send Message

Message

Sender	"UNC Marketing and Communications" <marketing@enrolled.unco.edu>	Reply To	"UNC Marketing and Communications" <marketing@unco....>
Recipient			
CC			
Subject	ENTER SUBJECT		
Preheader	ENTER PREHEADER		

UNC UNIVERSITY OF NORTHERN COLORADO

Marketing and Communications



Copy Message Mailing

Destination

New Message Mailing

Message Mailing Name

Folder

Marketing and Communication

/

Training

User

Smith, Madeline

Name	Type	As Of
<div> <div></div> <div> <div></div> <div>TEMPLATE-MARCOM-2024-Template-Basic-w/Hero-1CTA</div> </div> </div>	Message Mailing	8/26/2024

Save

Cancel

To create a mailing from scratch, click **New Mailing**,

slate

Deliver

New Mailing

Search Mailings...

Status	Name	Method	Sender	Start Date	Updated	Message Mailing Sender	User Full Name	Message Mailing UTM Source
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Once you have named your mailing (Name your mailing following the naming convention explained in Step 1A below), **proceed with the following selections:**

- **Folder:** Place the mailing within your Unit folder and subfolder (refer to the table above for guidance).
- **User:** This value defaults to the user who is currently logged in.
- **Realm:** Select your Office or Department name for the Realm.
- **Method:** This value defaults to “Email (HTML Editor).”
- **Template:** Each unit has its own templates, organized in alphabetical order by unit. Select a template associated with your unit.
- **Opt-Out:** Select the appropriate opt-out group for your unit. This step ensures that when a recipient unsubscribes, they only opt out of communications from this specific group rather than from all university communications. Overriding an opt-out should be reserved for transactional emails only and done sparingly under exceptional circumstances.
- **UTM Tracking:** This value defaults to disabled
- **Hide From Timeline:** This value defaults to the box unchecked
- **View in Browser:** This defaults to the box unchecked

New Mailing

Name

MARCOM-STAFF-My-UNC-App

Folder

Marketing and Communication /

User

Smith, Madeline

Realm

0 - Office: Marketing and Communications (MARCOMM)

Method

Email (HTML Editor)

Template

MARCOM Basic - w/hero image - UPDATED

Opt Out

MARCOM Information

UTM Tracking

Disabled

Hide from Timeline

☐

View In Browser

☐

Save

Cancel

STEP 1A: Name your email:

- **Name your email** using the following standardized UNC naming convention:
 - **UNIT-TYPE-PopulationDetails-Email-Subject**
 - **IE: MARCOM-UGGR-All-My-UNC-App**

Category	Details
Unit Abbreviation (CAPITALIZE)	Academic Advising = SAS Assessment = Assessment BearCentral = BC Bursar = BUR Career Readiness = CCR Center for Honors, Scholars, and Leadership = Honors Program Center for the Enhancement of Teaching & Learning = CETL Center for Urban Education = CUE College of Education and Behavioral Sciences = CEBS College of Humanities and Social Sciences = HSS College of Natural and Health Sciences = NHS College of Performing and Visual Arts = PVA Colorado Center for Rural Education = CCRE Dining = DEX Disability Resource Center = DRC Division of Diversity, Equity and Inclusion = DEI Division of Student Affairs and Enrollment Services = SAES Extended Campus = EC Financial Aid = OFA Graduate School = GS Housing = HRE Human Resources = HR Information Management & Technology = IM&T Instructional Design and Development = IDD Marketing and Communication = MARCOM Monfort College of Business = MCB New Student Orientation and Transition Programs = NSO News and Public Relations = NPR Office Health Promotion = OHP Office of Global Engagement = OGE Office of Student Engagement = OSE Office of the President = PRES Office of Undergraduate Research and Creative Endeavors = OUR Payroll = Payroll Performing and Visual Arts Advising Center = PVAAC Professional Administrative Staff Council = PASC

	Provost = PROV Registrar = REG Scholarships = SCH School of Art and Design Galleries = SOAD Soar = Soar Student Orgs = OSO Tutorial Services = TS UEngage = UEngage University Events = UE University Libraries = LIB
Student/Audience Type (CAPITALIZE)	<i>Please list out all applicable audience together in name</i> <i>IE: UGGR for an email going to Undergrad and Grad students</i>
	UG = Undergrad
	GR = Graduate
	ND = Non-Degree
	FAC = Faculty
	STAFF = Staff and Faculty
	PAR = Parent
	INF = Counselors/Other
Population Details (First Letter/Proper Case)	<i>Please list out all applicable populations together in the name.</i> <i>Specify your audience with as much detail as you can.</i>
	IE: CEBSSpecialEdMajors
	IE: ArlingtonParkResidents
	IE: RegisteredStudents
	IE: MeritScholars
	IE: CCREFacultyStaff
Email Name/Subject	<i>Please list out the subject of your email using hyphens to separate each word.</i>

(First Letter/Proper Case)	<i>IE: October-Newsletter-24 for a newsletter going out in October</i>
	IE: Fafsa-Reminder
	IE: Research-Opportunity
Naming Order	<i>Only use the applicable areas below:</i> Unit, Type, Email Name/Subject
	IE: MARCOM-UGGR-ALL-My-UNC-App
	IE: MARCOM-STAFFFAC-My-UNC-App
	IE: MARCOM-UGGR-ALL-My-UNC-App-2
	IE: NHS-UG-NHSBiologyMajor-Requirement-Announcement
Capitalization Style	UPPERCASE =
	UNIT
	TYPE
	First Letter / Proper Case =
	Population Details
	Email Name/Subject
Hyphen Guidelines	<i>Use hyphens to separate words, when applicable</i>
	NO hyphen (keep words together) = UNIT, TYPE, Population Details
	YES hyphen = Email Name/Subject
Email Name Example	BUR-UG-AllRegisteredStudents-1098T-Form
	EBS-FAC-August-Newsletter
	IE: HR-STAFF-ClassifiedStaff-Compensation-Update

Email Name Cheat Sheet:

UNIT-TYPE-PopulationDetails-Email-Subject

IE: PVA-UG-SOMstudentsall-August-newsletter

Once you've completed step one and two, click "Save." You will then be ready to add your recipient list.

STEP 3: Add your recipient list

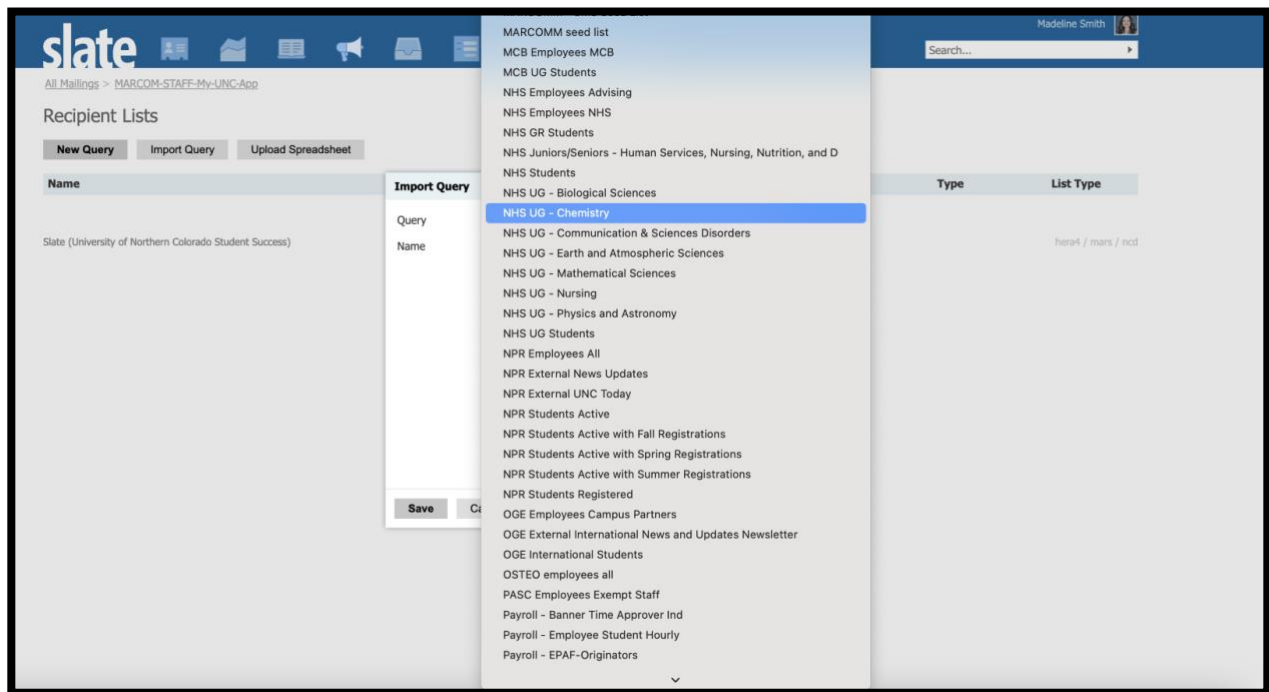
Navigate to "Edit Recipient Lists" (right-hand side)

The screenshot shows the Slate email marketing interface. At the top, there's a blue header with the 'slate' logo and a search bar. Below the header, the main content area is titled 'MARCOM-STAFF-My-UNC-App'. On the right side, there's a vertical menu with three buttons: 'Edit Recipient Lists' (circled in red), 'Edit Message', and 'Send Mailing'. The 'Edit Recipient Lists' button is highlighted with a red circle. Below the menu, there's a 'Message' section with details about the email being edited, including the sender, recipient, and subject. At the bottom, there's a preview of the email content, which includes the UNC logo and the text 'Marketing and Communications'.

Then select "Import Query."

The screenshot shows the 'Recipient Lists' page in the Slate interface. At the top, there's a breadcrumb trail: 'All Mailings > MARCOM-STAFF-My-UNC-App'. Below this, the title 'Recipient Lists' is displayed. Under the title, there are three buttons: 'New Query', 'Import Query' (circled in red), and 'Upload Spreadsheet'. Below the buttons, there's a table with columns: 'Name', 'Created', 'Type', and 'List Type'. The table contains one row with the name 'Slate (University of Northern Colorado Student Success)'. At the bottom right of the table, there's a link: 'here94 / mars / ncd'.

Select your Query (the group you wish to send to) from the dropdown – these queries already have the correct filters and exports and are organized in alphabetical order by unit. Once you select your query, click “Save.”

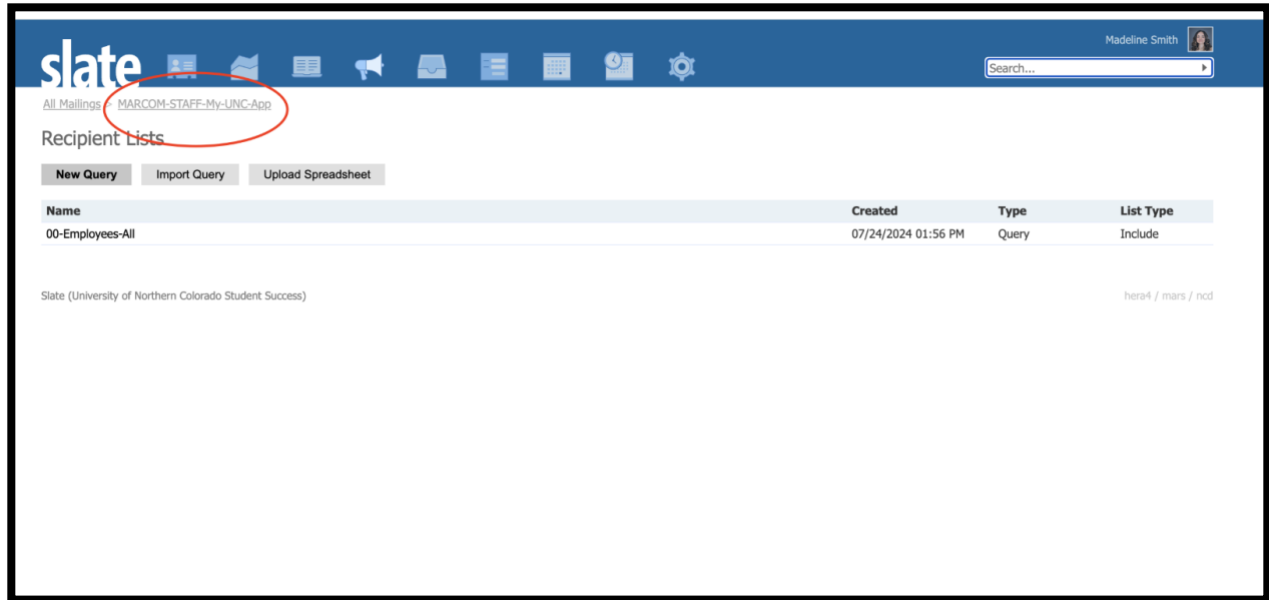


QUERY REQUESTS:

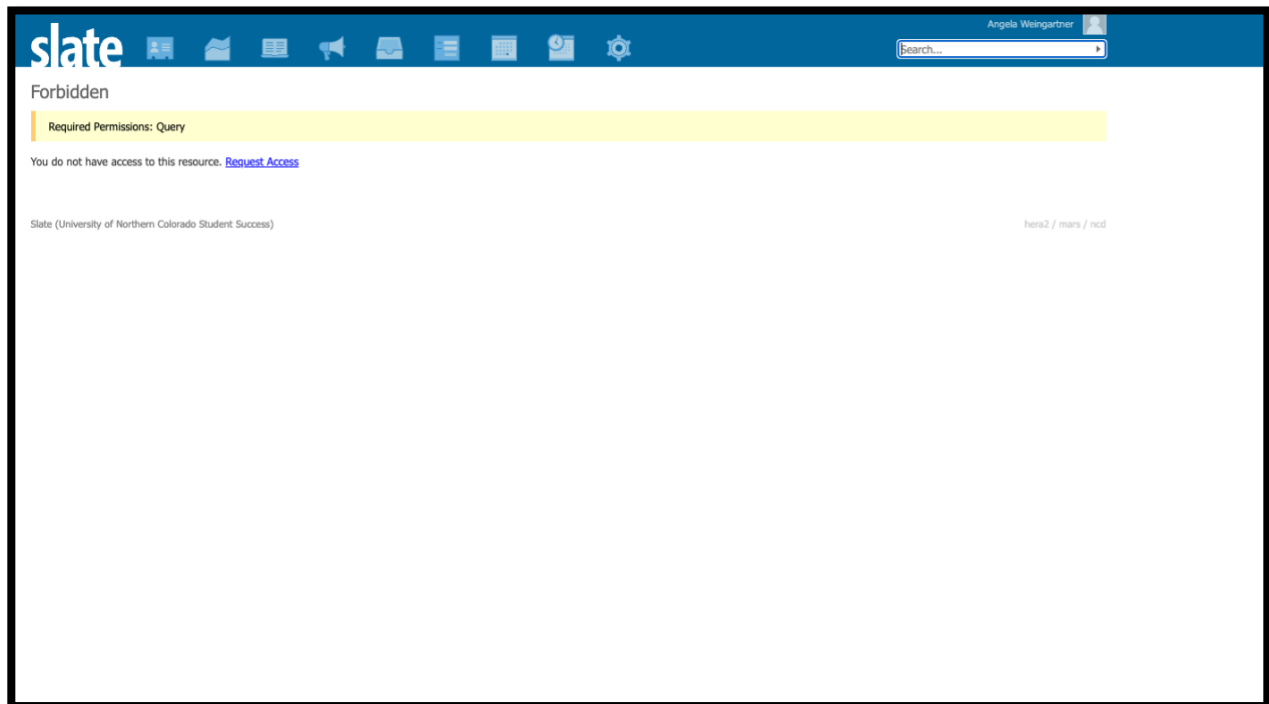
If you need a new query or population built that does not currently exist in Slate, please submit a ticket to IT. They will prioritize your request and address it as soon as possible.

- [Fill out the form here](#)

To return to editing your email, click the name of the email in the breadcrumbs in the top left OR hover over the megaphone icon to see your most recent emails



Or, if you see this screen, simply click “back” on your browser.



STEP 4: Edit and Test the Message:

Click Edit Message (right-hand side) to edit the mailing's copy and sender information.

The screenshot shows the Slate email marketing interface. At the top is a blue header with the 'slate' logo, navigation icons, a search bar, and the user 'Madeline Smith'. Below the header, the page title is 'All Mailings' and the specific mailing is 'MARCOM-STAFF-My-UNC-App'. On the right, there is an 'Edit' button and a dropdown menu with options: 'Edit Recipient Lists', 'Edit Message' (which is circled in red), and 'Send Mailing'. The main content area displays the mailing configuration details:

Method	Email
Folder	Marketing and Communication
User	Madeline Smith
Realm	0 - Office: Marketing and Communications (MARCOMM)
Recipient Lists	00-Employees-All Not In Employee: Test Record All Employees
Current Status	Not Running
Timing	Send upon activation
Opt Out	MARCOM Information

Below the configuration details is a 'Message' section with the following information:

Sender	"University of Northern Colorado" <marketing@enrolled.unco.edu>	
Recipient		
CC		
Subject	Test	
Preheader		

On the right side of the message section, there are buttons for 'Preview Message' and 'Send Message'. At the bottom right, there are icons for desktop, tablet, and mobile views.

Once there, be sure to check:

- **Sender:** You can customize this section. Feel free to change the text within the quotation marks to display the desired sender name to your recipients. However, please do not alter the associated email address.

Edit Message

Sender: "University of Northern Colorado" <marketing@enrolled.u> Reply To: "University of Northern Colorado" <market> Employee-Email

Recipient: Employee-Last

CC: Employee-Preferred

Subject: {{Employee-Preferred}}, download the New My UNC App Before June 30! Version 1

Preheader: Experience a seamless, integrated university life with our new app.

Save Cancel

STEP 5A: Review Email and Second Checker

- **Review and Final Checks:** Thoroughly check the accuracy of all links, images, and content.
- **Content Accuracy:** Ensure that all written content is free of spelling and grammatical errors. Confirm that the tone and messaging align with the intended purpose of the email.
- **Link Verification:** Click on every link to verify that it directs to the correct and functioning URL.
- **Design Consistency:** Check that the email is consistent with brand guidelines, including colors, fonts, and layout. No additional font colors added to your emails. Make sure the spacing is correct and displays correctly across different devices.
- **Accessibility:** Ensure that the email is accessible, with readable fonts and alt text is added for images.
- **H1 and H2 Headings:** Ensure that H1 and H2 headings are used appropriately and not for greetings (e.g., "Hello" or "Dear [Name]"). H1s should be reserved for the main headline or key content of the email. H2s should be used for subheadings that organize content within the email.
 - If either an H1 or H2 isn't necessary for the email structure, consider eliminating it altogether to avoid confusion for screen readers and improve accessibility.

- **Peer Review:**
 - Designate a second person to independently review the email. They should perform the same checks above with a fresh perspective, catching anything that might have been missed.

This review process is crucial to ensure the email is error-free, professional, and aligns with university standards.

STEP 5B: Schedule and Prepare for Approval

- **Prepare for Approval:** Once email is complete, tested, and ready to send, it's time to schedule your email for approval (see screenshot below):
 - Click "Send Mailing."
 - Under "Timing," select "Send at a Future Date/Time."
 - Select the day/time you wish to send (note that Slate defaults to Eastern Time)
 - Check the box next to "Review" labeled "This message is ready for review."
 - Click "Save Settings" button at the bottom.

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

1,530 recipients eligible for immediate delivery.

The recipient count is determined from the following lists:

1. 00-Employees-All (live) - 1,530 recipients

Recipient Lists

00-Employees-All

Batch Size (optional)

Send max messages and suspend.

Review

☒ This message is ready for review.

Outbox

☐ Send to outbox and do not deliver automatically.

Frequency

Send mailing once

Timing

Send at a future date/time

Time

at in
Messages will begin sending in approximately 22.2 hours.

Deduping

Send only one message/recipient

Send Mailing

Save Settings

Cancel

- **Submit Request to Send:**
 - Complete the "[Request to Send an Email](#)" form with all relevant information, including the date/time for sending.
 - You will receive confirmation once your email is approved and scheduled.

If you have any questions, please contact marketing@unco.edu