Four Steps for Creating an Email in Slate Using a Template

Note. Campus or Department Communicators must submit their request for email distribution with the Central Marketing and Communications team through the project request form **at least 24 hours before** the desired distribution.

- Under "What do you need support with?" select "Approval to send an email at a certain date(s) and time(s)".
- For "What are the date(s) and time(s) you prefer to send your email(s)?" list the date(s) and time(s) you would like your email(s) sent.

The central Marketing and Communications team will review the UNC's global communications calendar that they manage and maintain, and select a date and time as close to the original request as possible, ensuring that overlapping communications do not occur to the same student populations.

STEP 1: Create a New Mailing using a Template:

- Navigate to **Deliver** (megaphone icon at the top), click on **Mailings,** then click **New Mailing.**
- Configure the following setting:
    - **Name** – Give the new mailing a descriptive name so it can be found quickly using UNC's standard naming convention. Follow the following naming conventions outlined in the chart below:

Naming Convention Mailings	
Drip Campaign (Multiple Mailings)	**One-Time (AKA Ad Hoc) Mailing**
Department abbreviation (e.g., ofa, reg, bur, npr)	Department abbreviation (e.g., ofa, reg, bur, npr)
Term and year (e.g., sp23, su23, fa23)	Term and year (e.g., sp23, su23, fa23)
Campaign (e.g., FAFSA, REGISTRATION, BURSAR, HOUSING)	
Email number (e.g., EMAIL 1, EMAIL 2)	
Email description (e.g., important-dates, open-soon, sign-up-bear-pay, etc.)	Email description (e.g., important-dates, open-soon, sign-up-bear-pay, etc.)
Date Sent (e.g., 02-10-23)	Date Sent (e.g., 02-10-23)
Examples: ofa-fa21-FAFSA-EMAIL 1-important-dates-09-01-23 reg-sp22-REGISTRATION-EMAIL 1-open-soon-10-1-23	Examples: npr-sp23-ac-02-10-23 bur-fa21-sign-up-bear-pay-09-13-22

Naming Convention Folders	
Folder Name	**Subfolder Name**
Office of Financial Aid	2021-2022 2022-2023
Office of the Registrar	2021-2022 2022-2023

Office of The Bursar	2021-2022 2022-2023
News and Public Relations	Around Campus UNC Today UNC Today BOT

- **Folder** – Stay organized and place the mailing within your folder and subfolder. ALWAYS place the mailing in your folder and subfolders (see table above for guidance).
- **User** – This value defaults to the user who is currently logged in.
- **Realm** – Select your department's name for the realm.
- **Method** – Select Email (HTML Editor).
- **Template** – Select the template you like to use.
- **Opt-out** – Select your opt-out group. This way should the recipient unsubscribe, they will only unsubscribe from the group instead of all communications.
- **UTM Tracking** – if you are using links in your email, set your UTM parameters. If UTM tracking is enabled, codes are appended at the end of any URL to track clicks and performance of these communications.
    - Source: Slate
    - Term: Current semester + year
    - Campaign: Specific campaign the email belongs to, or, if not part of a campaign, use your department name/abbreviation
    - Medium: Email
    - Content: Description of the email

See the screenshot below:

- **Hide from Timeline**: Leave this box unchecked.
- **View in Browser**: Leave this box unchecked.

STEP 2: Add your Recipient List:

- Navigate to **Edit Recipient Lists** (right-hand side) and select **Import Query.**
- Select your Template Query – these queries already have the correct filters and exports.

To return to the mailing summary page, click the **name of the message** in the breadcrumbs in the top left.

STEP 3: Edit and Test the Message:
With the records identified, the content of the message may be crafted.

- Click **Edit Message** (right-hand side) to edit the mailing's copy. Be sure to check:
    - **Sender** – Do not send emails from your name, rather, use the official name of your office/department/business unit. For example, "Office of Financial Aid", "Bursar's Office." "College of Performing and Visual Arts". Do not use abbreviations such as SAES, OSO, etc. Those who are members of the Cabinet, Deans of Colleges and at the Vice President level can send emails with their personal name identifier and title such as: "NHS Dean Kamel Haddad." After the office/department name, use the official email address of your department, office or unit. For example, libraries@unco.edu or bursar@unco.edu.

Examples
"Division of Diversity, Equity and Inclusion" <equityandinclusion@unco.edu>
"Athletics" <athletics@unco.edu>
"Instructional Design" <Instructional.Design@unco.edu>
"Libraries" <libraries@unco.edu>

    - **Reply to** – Include a "Reply to" email address.
    - **Recipient** – Select the email export from the right-hand column of the editor.
    - **Add Subject and Preheader** – Try to make these less than 50 characters.
    - **Review** - Check the accuracy of all links, images and content.
    - **Call to Action** - Include an actionable CTA.
    - **Personalization** - Include merge fields, such as preferred name (to add a merge field, select it from the right-hand column of the editor, or click and drag it within the message).

Once you are done editing the message, save it. Once saved, the message preview will display sample messages with the merge fields displaying.

- Click on the Link Check icon above the message, and Slate will check your links.
- Send a test email by clicking on the **Send Test Message** and check the email on your computer and phone.

STEP 4: Schedule the Mailing
When the message is ready to send, configure the send settings by:

- Click **Send Mailing**. In the popup, you can review the estimated count of recipients and configure how the message should be sent (on an ongoing basis, on a single date, with duplicates, etc.).
- To send the mailing immediately, click **Send Mailing**. To schedule the message, choose a day and time and then click **Send Mailing**. Don't send anything before **7 a.m.** Mountain Time because the data is being refreshed every morning.

After confirming the intention to run or schedule the message, the mailing will enter a Scheduled/Running status.

Note. Only Slate campus users who have the Slate Campus/Department Communicator Permission have access to send an email through Slate. If you do not have access to this, reach out to your designated contact listed in the chart below.

College/Dept/Unit	Department Communicator	Contact
President's Office	Lori Riley; Jennifer Almquist	lori.riley@unco.edu; jennifer.almquist@unco.edu
Finance and Administration	Lori Brachtenbach	lori.brachtenbach@unco.edu
Provost's Office	Betsy Kienitz	betsy.kienitz@unco.edu
Faculty Senate	Nina Phillips	nina.phillips@unco.edu
Division of Undergraduate Academic Engagement	Loree Crow; Krista Caufman; Berniece Mitchell	loree.crow@unco.edu; krista.caufman@unco.edu; berniece.mitchell@unco.edu
Student Academic Success	Katie Mason; Berniece Mitchell	kathryn.mason@unco.edu; berniece.mitchell@unco.edu
Academic Effectiveness	Berniece Mitchell; Kathy Zellers	berniece.mitchell@unco.edu; kathy.zellers@unco.edu
Graduate School	Patrick Johnson	patrick.johnson@unco.edu
College of Education and Behavioral Sciences	Duard Headley	duard.headley@unco.edu
College of Humanities and Social Sciences	Duard Headley; Jose Hernandez Albarado	duard.headley@unco.edu; jose.hernandezalbarado@unco.edu
Monfort College of Business	Nathan Tran	nathan.tran@unco.edu
College of Natural and Health Sciences	Nathan Tran	nathan.tran@unco.edu
College of Performing and Visual Arts	Sara Schuhardt; Carissa Reddick; Donna Goodwin; Shelly Gaza; Katie Runkel	sara.schuhardt@unco.edu; carissa.reddick@unco.edu; donna.goodwin@unco.edu; michelle.gaza@unco.edu; katherine.runkel@unco.edu
Extended Campus	Jessica Sklba; Ethan Swan	jessica.sklba@unco.edu; ethan.swan@unco.edu
Libraries	Jennifer Beck; Natasha Floersch	jennifer.beck@unco.edu; natasha.floersch@unco.edu
News and Public Relations	Deanna Herbert; Sydney Kern	deanna.herbert@unco.edu; sydney.kern@unco.edu
Division of Diversity, Equity and Inclusion	Jorge Jacquez-Marquez	jorge.jaquezmarquez@unco.edu
Athletics	David Sabolcik; Dennis Driscoll	david.sabolcik@unco.edu; dennis.driscoll@unco.edu

Professional Administrative Staff Council	Alex Hilton	alexandra.hilton@unco.edu
Global Engagement	Olga Baron; Berniece Mitchell	olga.baron@unco.edu; berniece.micthell@unco.edu
Information Management & Technology	Tiffany Wood	tiffany.wood@unco.edu
Human Resources	Sarah Chase	sarah.chase@unco.edu
Urban Education	Erin Hart	erin.hart@unco.edu
Division of Student Affairs and Enrollment Services	Casey Sperry; Marcie Tucker	casey.sperry@unco.edu; marcie.tucker@unco.edu
Police Department	Patrick Gallagher; Tyler Weaver	patrick.gallagher@unco.edu; tyler.weaver@unco.edu
Alumni	Tamsin Fleming; Grayson Meek	tamsin.fleming@unco.edu; grayson.meek@unco.edu
Office of Research and Sponsored Programs	Sol Adams; Nancy Schindele	sol.adams@unco.edu; nancy.schindele@unco.edu