



# Messaging in Slate

Slate Training Guide

2023

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## Introduction

Emails play an essential role in student recruitment, retention and engagement. With Slate, communications can be sent in bulk, individually, scheduled or ad hoc. They can also be sent sequentially, as part of a drip marketing campaign, with triggers. This guide will help you navigate the **Slate Deliver system** and introduce you to the various features the system offers.

## Slate Access

If you do not currently have Slate Campus access, please complete the access form request below:

[Slate Campus Access Request Form](#)

There are two types of deliver access levels (permissions) in Slate:

- **Campus/Department Communicator role:** The UNC central Marketing and Communications team will work with colleges, departments and units to identify Campus/Department Communicators, who are trained and designated by central marketing at UNC to disseminate communications on behalf of their college/unit/department to UNC students, faculty, staff and more via Slate.
- **Communications Assistant role:** This refers to staff assisting in the creation but not dissemination of communications to UNC students, faculty, staff and others via Slate. Once the communication is created, the department communicator will review, approve and send the communication.

## Slate Training

Note: Before Slate training can occur, please complete the [Slate Campus Access Request Form](#).

Schedule a training session. Training can be provided at the University Advancement office in Carter Hall or through Teams. Just let us know; we are always happy to accommodate!

Schedule a [Slate Campus Deliver Training](#).

Have a quick question? Contact Marketing and Communications @ [marketing@unco.edu](mailto:marketing@unco.edu).

## Slate Campus Support Form

If you need help with an existing email, creating your email recipient list or need a report, please complete the [Slate Campus Support Form](#). If you want to create a new one-time mailing, marketing campaign or need email graphics for Slate mailings, please complete the [Project Request Form](#).

## Logging Into Slate

Once your access has been granted, you can log in by going to:

<https://enrolled.unco.edu/manage/>. Once you log in, you should see the Slate homepage pictured below.



## Slate Tools Overview

When you first log in to Slate (<https://enrolled.unco.edu/manage/>), you will see the dashboard header, pictured below.



The dashboard houses many useful tools, which are outlined in the table below:

|  |  |
|--|--|
|  | Records: Used to search the database and access the student and employee records.  |
|  | Queries/Reports: Used to pull information from the database using specific search criteria and filters.  |
|  | Reader: Organize application materials within the Reader. When a tab is selected, the associated materials will appear in the Reader.                |
|  | <b>*Deliver: used to send customized mailings to students/employees.</b>   |
|  | Inbox: Houses messages routed into Slate.  |
|  | Forms: Allows users to create forms to gather information about students, applicants or staff members within Slate.                                  |
|  | Events: Used for scheduling events, enabling registration and more.  |
|  | Interviews: Used for scheduling interviews.  |
|  | Database: Where data is stored within Slate.<br>This is also where users can access the educational and support resources located in Discover Slate. |

|  |  |
|--|--|
| <input type="text" value="Search..."/> | Search: Used to search for students/employees. |
|--|--|

**\*Note. This training guide will focus on the Deliver Tool only.**

## Using Deliver

The Campus/Department Communicator, as defined above, must submit their request for email distribution through the [project request form](#) with the message send date, time and audience at least 24 hours before the desired distribution.

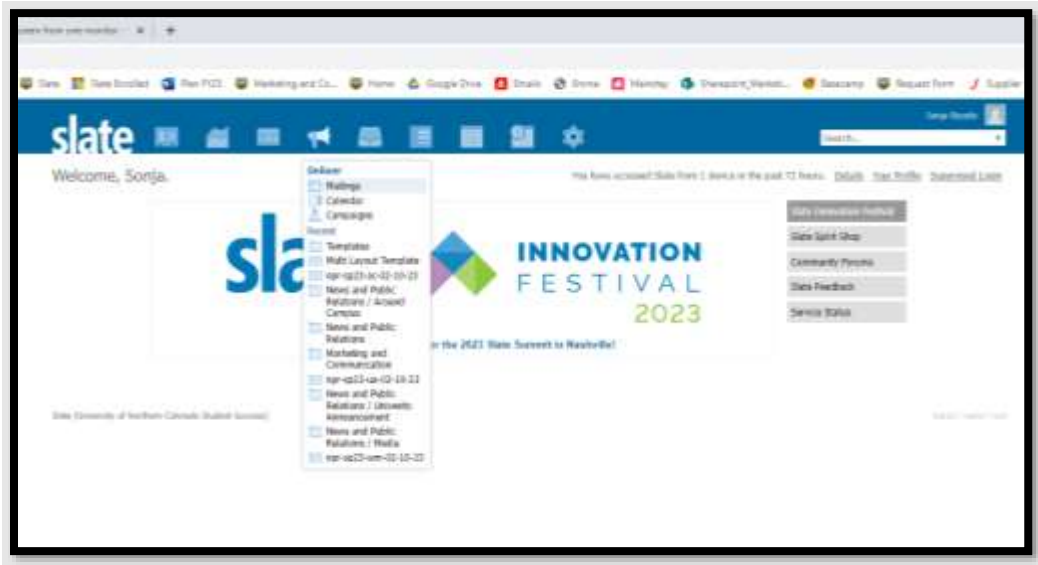
The central Marketing and Communications team will review the UNC's global communications calendar that they manage and maintain and select a date and time as close to the original request as possible, ensuring that overlapping communications do not occur to the same student populations. Failure to put in an email request with the central Marketing and Communications team for scheduling can result in restricted or removed access from Slate. Submit your request [here](#). 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.

This section explains how to access and build your emails into the ideal messages for your intended audience.

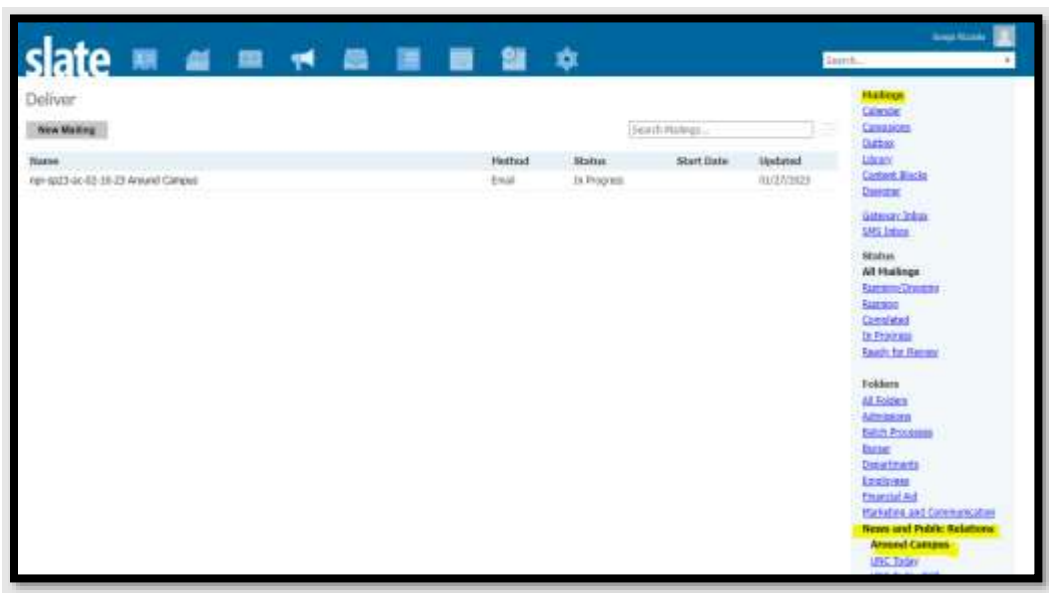
### Deliver Basics 1: Creating a New Mailing

Watch the [VIDEO](#) for an overview of Slate Deliver. Now let's get started!

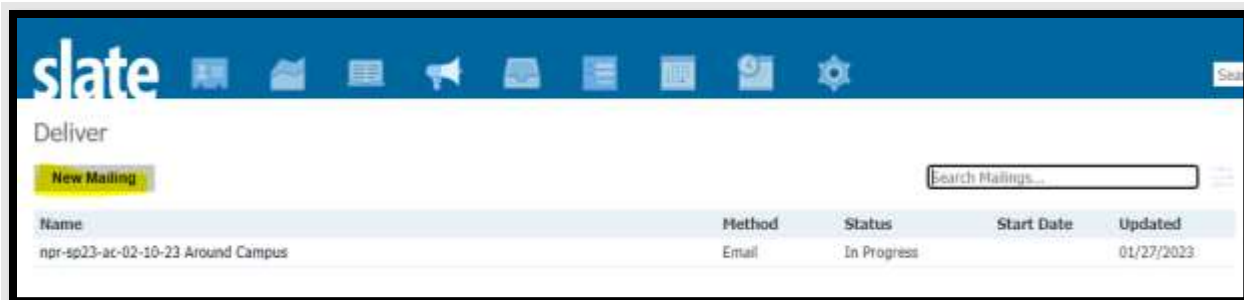
**Step 1:** Click on the Deliver Icon (megaphone) and select **Mailings**.



**Step 2:** Here you will find a complete list of all current mailings. Use the Folders and Subfolders in the right-hand column to locate messages. From here, select your department/college/unit's name from the right-hand side under Folders.



**Step 3:** After selecting your Folder and Subfolder, you'll find all your emails. From here you can copy an existing mailing, edit the mailing or create a new mailing. Click on "New Mailing" to create a new email.



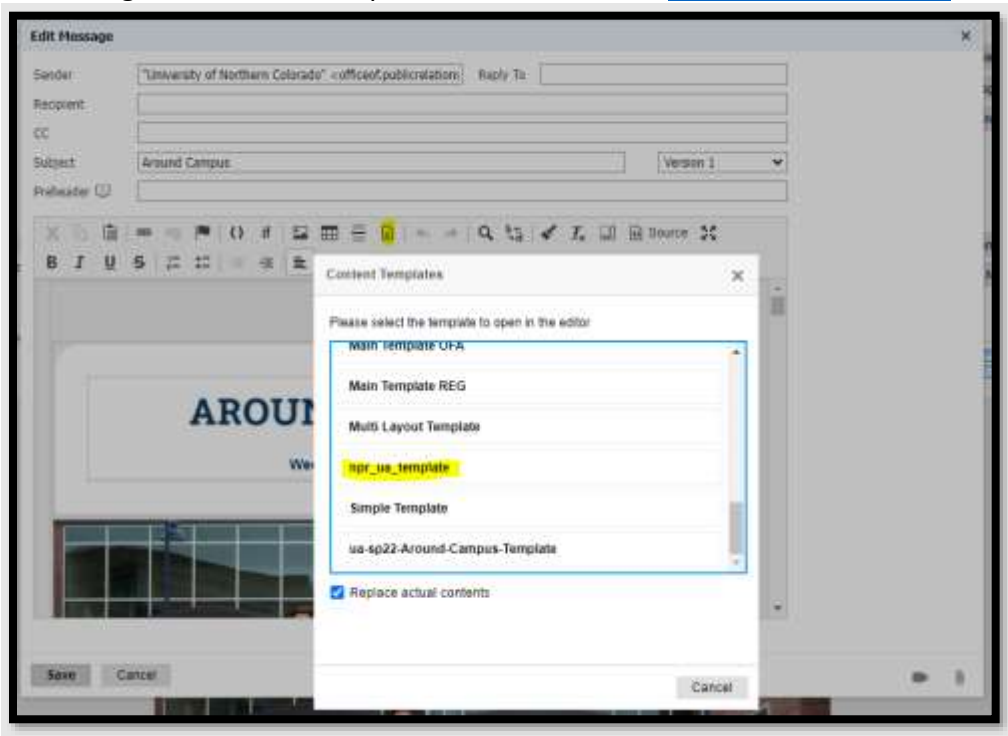
**Step 4:** Create a new mailing using a standard naming convention for the name and folder. For guidance on naming conventions for mailings, folders and subfolders, see the table below. If you still have questions, please reach out to [marketing@unco.edu](mailto:marketing@unco.edu).

**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:<br>ofa-fa21-FAFSA-EMAIL 1-important-dates-09-01-23<br>reg-sp22-REGISTRATION-EMAIL 1-open-soon-10-1-23 | Examples:<br>npr-sp23-ac-02-10-23<br>bur-fa21-sign-up-bear-pay-09-13-22      |

| Naming Convention Folders |   |
|---------------------------|---|
| Folder Name               | Subfolder Name                              |
| Office of Financial Aid   | 2021-2022<br>2022-2023                      |
| Office of the Registrar   | 2021-2022<br>2022-2023                      |
| Office of The Bursar      | 2021-2022<br>2022-2023                      |
| News and Public Relations | Around Campus<br>UNC Today<br>UNC Today BOT |

- **Folder:** Keep your communications organized by putting them in a folder. 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 – this will allow only users who have this realm to access this mailing.
- **Method:** The only method that is configured for use is:
  - **Email (HTML Editor):** This is the only method approved for use – there is no charge for using this method.
- **Templates:** Select the template you like to use – if you need a new template created, please complete the [Project Request Form](#). UNC-branded templates have been created for your use and are housed in the templates folder. We highly encourage you to use **Templates** to make the branding consistent across all your messages and to limit source coding frustrations. For questions, reach out to [marketing@unco.edu](mailto:marketing@unco.edu).



- **Opt-Out:** Select your opt-out group from the drop-down. This will allow the recipient to opt-out from specific messages from your college/department without opting out of all UNC messages (see below). Some messages are transactional and, therefore, cannot be opted out of. For more information about opt-out groups, go to [Deliver Basics 13](#).



**New Mailing**

Name: npr-sp23-ac-02-10-23

Folder: News and Public Relations / Around Campus

User: Kern, Sydney

Realm: News and Public Relations

Method: Email (HTML Editor)

Template: NPR\_AC\_Main Template

Opt Out: Around Campus

UTM Tracking: Disabled

Hide from Timeline: ☐

View In Browser: ☐

Save Cancel

- **UTM Tracking:** Set message-level UTM parameters from this view that are inherited by all URLs in your message. If your message has one Call to Action (CTA), the central Marketing and Communications Department recommends using this feature. 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:

**UTM Tracking** Enabled

Source: slate

Term: sp23

Campaign: npr

Medium: email

Content: ac feb 1

Hide from Timeline: ☐

View In Browser: ☐

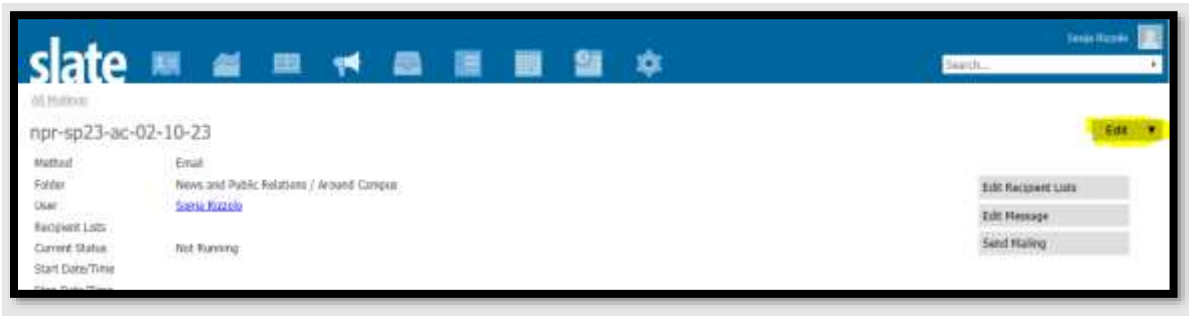
Save Cancel

- **Hide from Timeline:** Leave this box unchecked. If selected, the communication will not appear on the timeline of the receiving record.

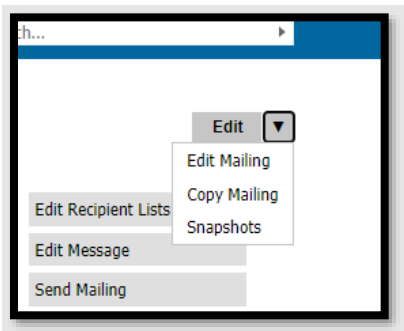
- **View in Browser:** Leave this box unchecked. This enables a merge field for embedding a “View in Browser” link in the communication. The link allows the recipient to open the message independently in a browser. If this option is selected, an Expiration Days field appears to define the number of days the link will function before expiring.

## Deliver Basics 2: Copying an Existing Mailing

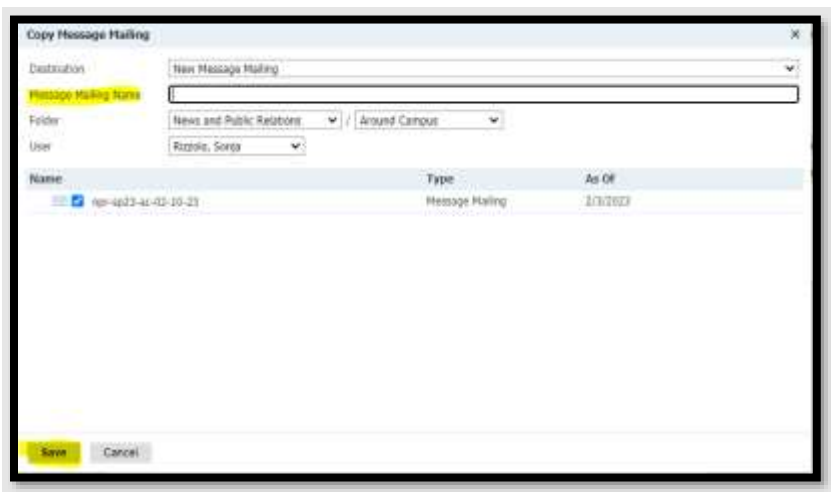
To copy a message, go to the mailing you would like to copy, open the mailing and click on Edit.



Then, click on “Copy Mailing”.



Give the message a name following the [naming convention](#) outlined above and click Save.

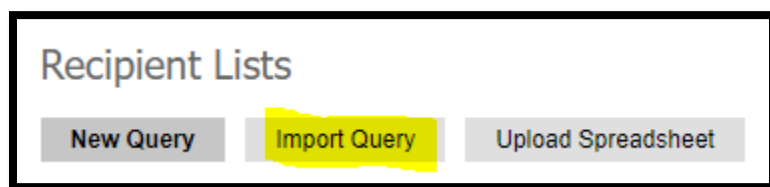


### Deliver Basics 3: Adding a Recipient List

Click on the “Edit Recipient Lists” to add a mailing list or lists to the deliver message.



The recipient list(s) is recipients who will receive the message. It will also let you add your exports/merge fields. The recipient list is referred to as a Query. Central Marketing and Communications recommends using number 2, **Import Query** listed below:



1. **New Query** – Use the New Query option to generate a list of recipients by constructing a Live Query. This option will let you create your own query. This can be complex – fill out the [Slate Campus Support Form](#) if you need assistance. We **highly recommend** you import a template query (see 2 below). These template queries already have the correct filters and exports created.
2. **Import Query** – Use the Import Query option to select a query previously created and saved using the Query tool. Here you can find templates specifically created for your unit/department. If you need to communicate to a different audience, please submit the [Slate Campus Support Form](#) or for questions reach out to [marketing@unco.edu](mailto:marketing@unco.edu).
3. **Upload Spreadsheet** – Use this option as the LAST RESORT. Use the upload spreadsheet option to add an Excel spreadsheet with recipient information. Slate strongly discourages this option unless necessary and there is no other way to access these recipients. Always try to do a live query when possible.

**Import Query:** this will allow you to import a previously created query. **We strongly encourage you to import a template query specifically developed for your office** since they already have the correct filters and exports created. All template queries will start with “unit name”- “audience”- “details audience” e.g., NHS-Students. This query will provide a list of registered NHS students. The query “NHS-Employees” will provide a list of current NHS employees. If you need additional template queries, please submit the [Slate Campus Support Form](#).

Recipient Lists

New Query Import Query Upload Spreadsheet

Name Created

Slate (University of Northern Colorado Student Success)

Import Query

Query

Configurable Joins - Person - 00-NHS-Students

### New Query:

- **Name:** copy the name of the mailing and use that for the name of the recipient list
- **Sharing:** check the checkbox so the query is shared with other users
- **Type:** Select Configurable Joins
- **Category:** Records
- **Base:** Typically Deliver messages should use one of two bases:
  - **Person:** If the mailing should go to current students.
  - **Employee:** If the mailing should go to employees.
- If you need to send a mailing to Students and Employees, create two recipient lists – one for each base listed above.

New Query

Name npr\_sp23\_ua-02-10-23

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

List Type Include

Type Configurable Joins

Category Records

Base Person

### How to Narrow Down the Recipient List

#### Adding your Exports/Merge Fields

Think of your query as an Excel spreadsheet. You can add your exports by clicking on the Export button on the right-hand side.

**Edit Query**

User: [Sonia Ruzale](#)

Realm: Students

Base: Configurable Joins - Person

Execution Mode: Retrieve only the new records since query was last run

Exports:

Person Email

Go Export

Use the search bar to search for specific filters such as the ones listed below (e.g., Person Email, Person Preferred, etc.) and select the export listed under direct exports.

**Insert Query Part**

Search:

Groups: ☒ Library Exports ☒ Direct Exports ☒ Extended Exports

**Direct Exports**

**Person**

Select All

**Extended Exports**

**Person** Relations Linked Persons and Self

Select All

**User** Current User

Select All

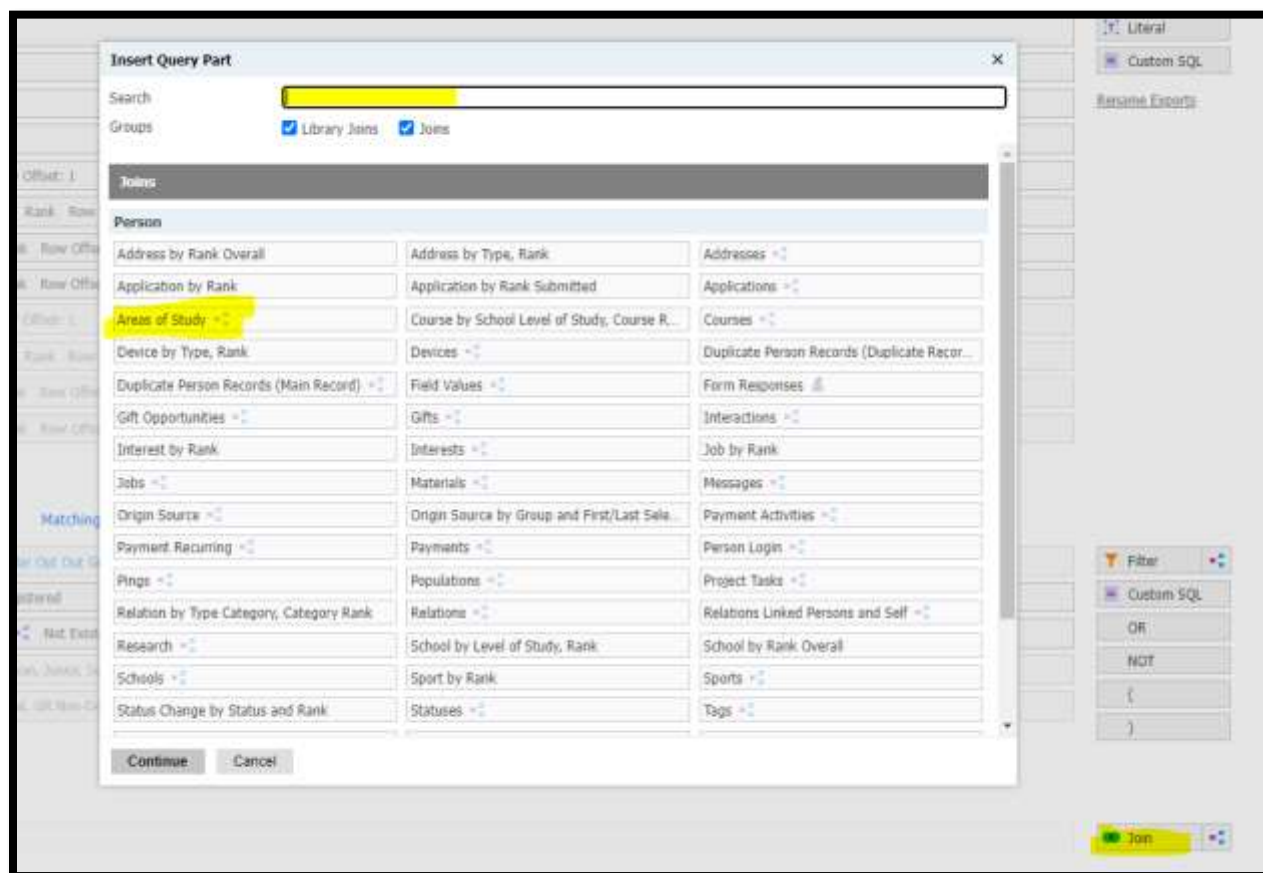
Exports you add from top to bottom will appear like column headings in your Excel spreadsheet from left to right. You must include anything you want to merge into your mailing as an Export (e.g., Email, Preferred first name, Last name).

- Here is a list of common exports from the Configurable Joins - Person base.
  - Person Email
  - Person Preferred\* (this is their preferred first name and should be used instead of their first name)
  - Person Last (name)
  - Class Level
- Here is a list of common exports from the Configurable Joins - Employee base:
  - Employee Preferred First (name)\*
  - Employee Last (Family) (name)
  - For email you will have to join with "Device by type, Rank."

*\*Note.* If a student or employee does not have a preferred name, Slate will pull in their first name automatically.

Drag and drop to arrange the exports in whatever order makes the most sense to you. The order does not matter for your message to be able to merge in these fields. Note: when in “Edit Message,” the order of your exports will appear in alphabetical order on the right-hand side.

If you want additional information about, for example, their college or program, you will have to join with an additional table e.g., Area of Study. Click on the Join field button at the bottom right corner and search for the join you would like to make or select it from the joins listed.



### **Filters = Who should receive the message**

Add additional filters to narrow down your results. Just like Exports, you’ll need to search here and figure out which ones work best for you.

**Matching Rows = Amount of results that the query will return.** Add more filters to increase or decrease this number.

If you are stuck or need help with your query, please submit the [Slate Campus Support Form](#) including the link to your query and a description of exactly what you’re trying to filter down to and we’re happy to help. We can also check a recipient list query for you if you provide details about who the intended audience is.

If you need to exclude a large group of recipients from a non-recurring mailing (e.g., if you create a new version of a mailing that has already been going out, and you need to exclude everyone who got the previous version of the mailing), you can simply **Run Query** and DO NOT delete the query run. This will exclude that group of people from this mailing.

### Joins = What other fields do you need to pull in:

If you cannot find the filter you are looking for, a [join](#) will allow you to connect with a different data table that does have that information.

[All Mailings](#) > [Test](#) > [Recipient Lists](#) > [npr\\_sp23\\_ua-02-10-23](#)

## Edit Query


|                |  |
|----------------|--|
| User           | <a href="#">Sonja Rizzolo</a>                          |
| Base           | Configurable Joins - Person                            |
| Execution Mode | Retrieve only the new records since query was last run |

### Exports


|                    |
|--------------------|
| Person Email       |
| Person Preferred   |
| Person Last        |
| Person Class Level |

### Filters

[Check Logic](#) Matching Rows: 17

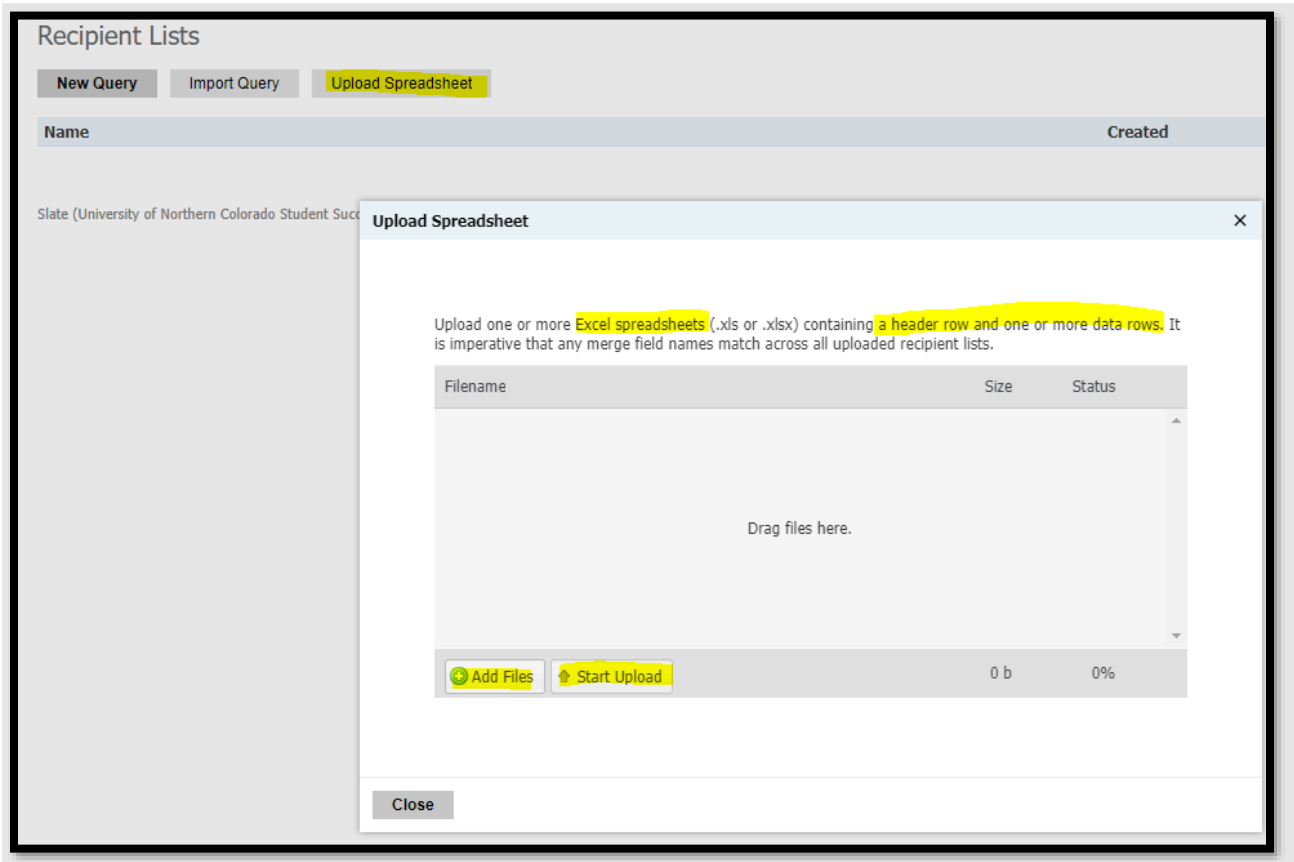
|  |
|--|
| <a href="#">Remove Test Records</a>  Not Exists |
| <a href="#">Status</a> IN Active - Registered  |
| <a href="#">Areas of Study / Area of Study Degree</a> IN Baccalaureate Degree  |
| <a href="#">Areas of Study / Area of Study</a> IN Anthropology   |

### Joins

|   |
|---|
| <a href="#">Areas of Study</a>  Rank Row Offset: 1 |
|---|

### Upload Spreadsheet:

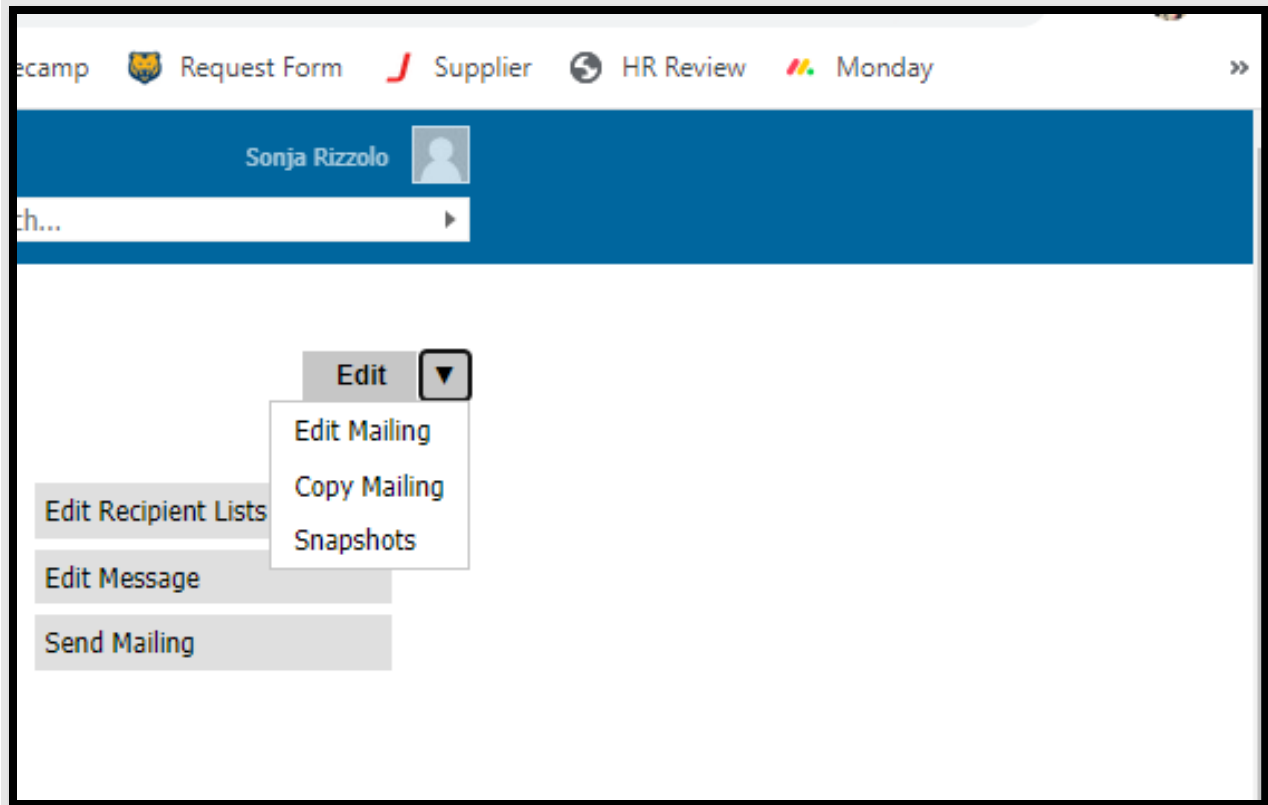
Use this as a LAST resort only. Before loading any data into Slate, please reach out to [marketing@unco.edu](mailto:marketing@unco.edu). The column headers become your merge field. This is the **LAST Resort** and is only to be used when a live query cannot be used to find the recipients. For example, if you are pulling in a contact list of those who have purchased tickets to a UNC event from a third-party platform, you will need to upload that Excel document of contacts into Slate to communicate to that audience through Slate. Before loading any data into Slate, please reach out to [marketing@unco.edu](mailto:marketing@unco.edu).



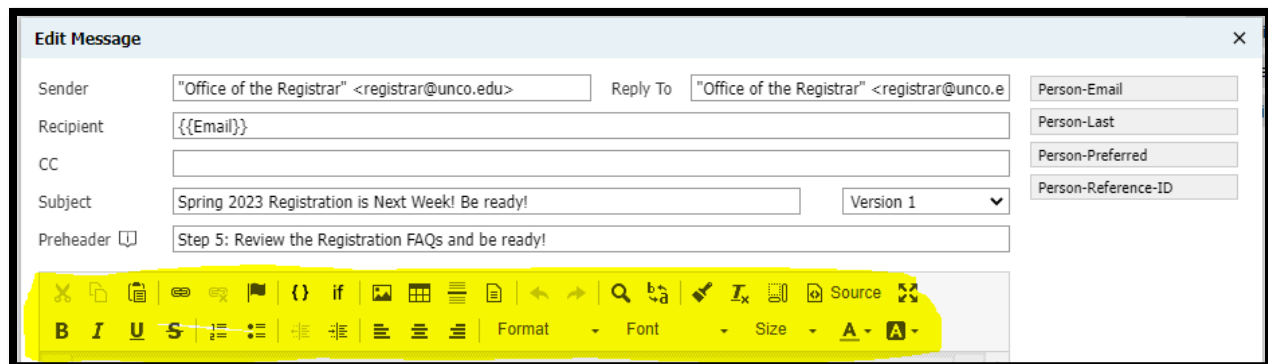
### Deliver Basics 4: Editing the Mailing

- Click your mailing and the **Edit Message** button in the right-hand column to edit your email copy.





- You are now in the **Message Editor**. As you can see, Slate offers lots of tools to help you build messages.



- **Sender:**
  - From Name: 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, except for commonly known acronyms such as College of Natural Health and Sciences (NHS). 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,” or “Cristina Giletti, PVA Dean.”

- From Address: Use the official email address of your department, office or unit. For example, [libraries@unco.edu](mailto:libraries@unco.edu) or [bursar@unco.edu](mailto:bursar@unco.edu).

| Examples   |
|--|
| “Division of Diversity, Equity and Inclusion” < <a href="mailto:equityandinclusion@unco.edu">equityandinclusion@unco.edu</a> > |
| “Athletics” < <a href="mailto:athletics@unco.edu">athletics@unco.edu</a> >   |
| “Instructional Design” < <a href="mailto:Instructional.Design@unco.edu">Instructional.Design@unco.edu</a> >                    |
| “Libraries” < <a href="mailto:libraries@unco.edu">libraries@unco.edu</a> >   |

- **Reply To:** Use quotation marks around the text you want the student to see (your department name). Place greater than and less than signs around your email address, such as [libraries@unco.edu](mailto:libraries@unco.edu). For example, “Office of the Registrar” <[registrar@unco.edu](mailto:registrar@unco.edu)>.
- **Recipient:** Double-click on the email field listed under the exports. For the email field to show up and work, it needs to be chosen in the recipient list as an export.
- **Subject Line:** When titling your message, we recommend limiting it to under 50 characters. Subject lines longer than this are too large for cell phone screens and will be cut off. You MUST fill out the subject line to Save your message.
- **Preheader:** Add a preheader. The preheader is what shows up in your inbox under the subject line, such as a preview line. Keep this text to under 100 characters and ensure the message relates to the subject line.

Here is an example of how a subject line and preheader will display:



easy to use. Simply click on an export and it will appear wherever you placed your cursor. They are indicated by double curly braces around them, e.g. {{Preferred}} merges in the recipient's Preferred Name (if no preferred name exists, then it merges in the First Name). You determine your merge fields when you create or upload your recipient list. To see how they will look in the email, save your message and it will populate the merge fields. If you want to look at a particular student or employee, click on Display Sample Message and either type the name or Bear ID in the record field, then click on display to preview the message with the populated merge fields.

- **Liquid Markup and Conditional Logic: Utilize these if you** want to display different content for different segments of your population e.g., students will need to see the first sentence and everyone else will need to skip the first sentence and only see the second sentence (see example below). There are two ways to add conditional logic:
  - Highlight the text you want to conditionally display and click on the “if” (see below), then select the “merge field”, “operator ==” and “value” as whatever population the selection will be visible to, for example, “student”. See the example below.
  - The more advanced option is to click on “Source” and add the coding to the source code.

**Edit Message**

Sender: "UNC Admissions" <admissions@unco.edu> Reply To: teacher.education@unco.edu

Recipient: {{sys-email}}

CC:

Subject: Keep your momentum going! Version 1

Preheader: What does your teaching journey look like?

**Conditional Logic**

Text to conditionally show:  
Discover UNC is a free event open to high school sophomore and junior students, and their

Show selected text only when: ug\_ftc\_vistor\_type Operator: == Value: Student

And: Operator: Value:

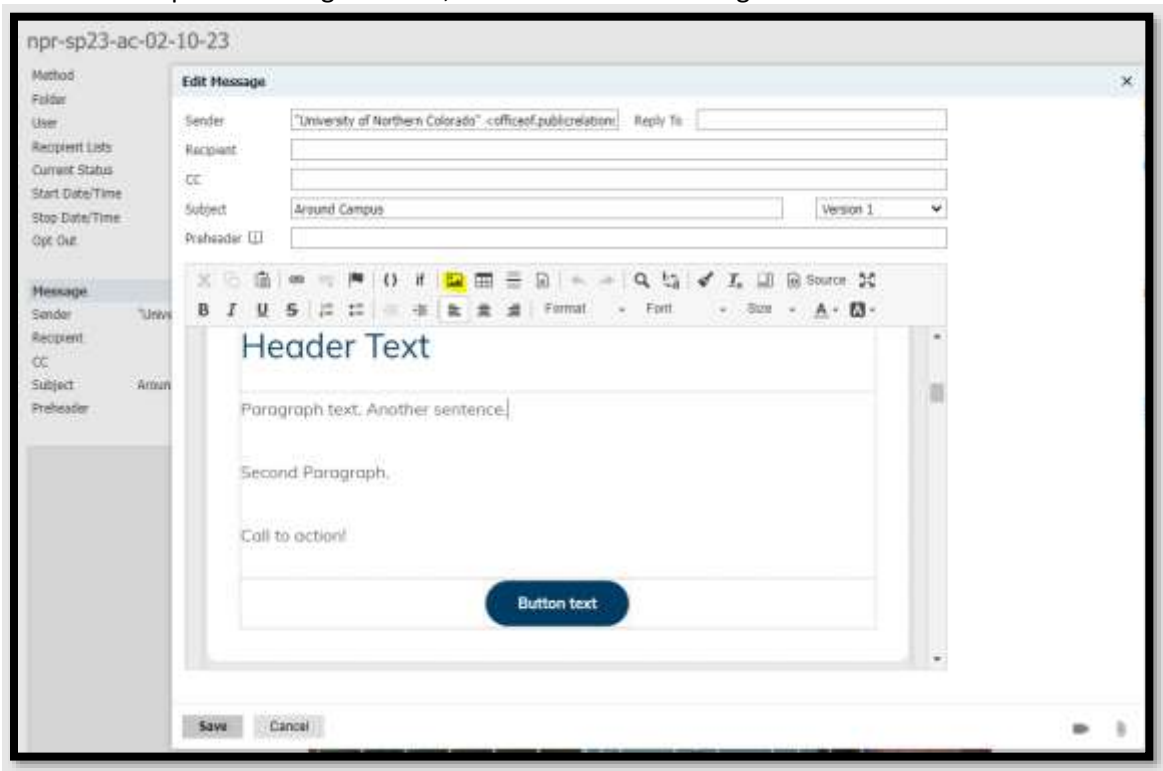
And: Operator: Value:

OK Delete Cancel

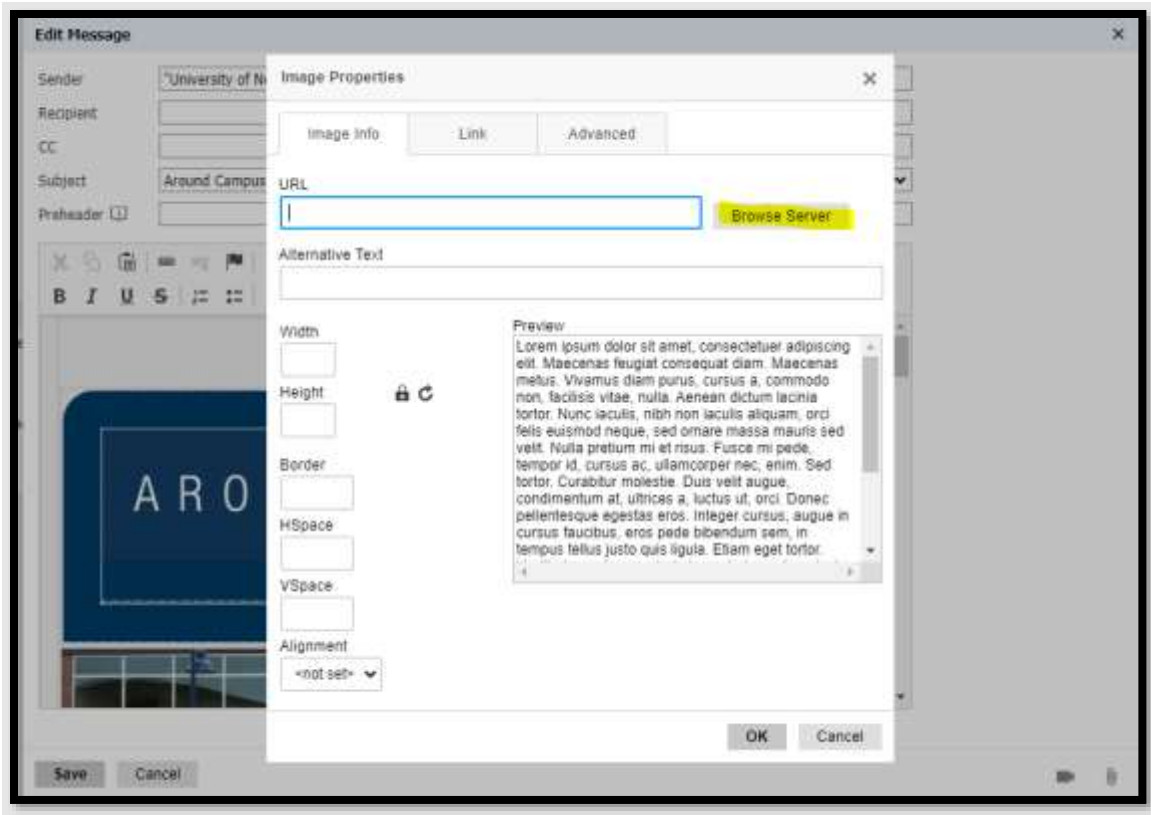
```
{% if {{ug_ftc_vistor_type}} == 'Student' %}If you're planning to start college this
summer or fall, we are waiving your application fee! Apply to UNC and use
this code: FTCUNC
{% else %} We are sending a Thank You email to each student that attended
letting them know that, if they haven't already, they can apply to UNC for free
with this code: FTCUNC
{% endif %}
```

## Deliver Basics 5: Adding or Replacing Images

To add an image in Slate, go to your mailing and select the image icon located near the center of the toolbar. To replace an image in Slate, double-click on the image.



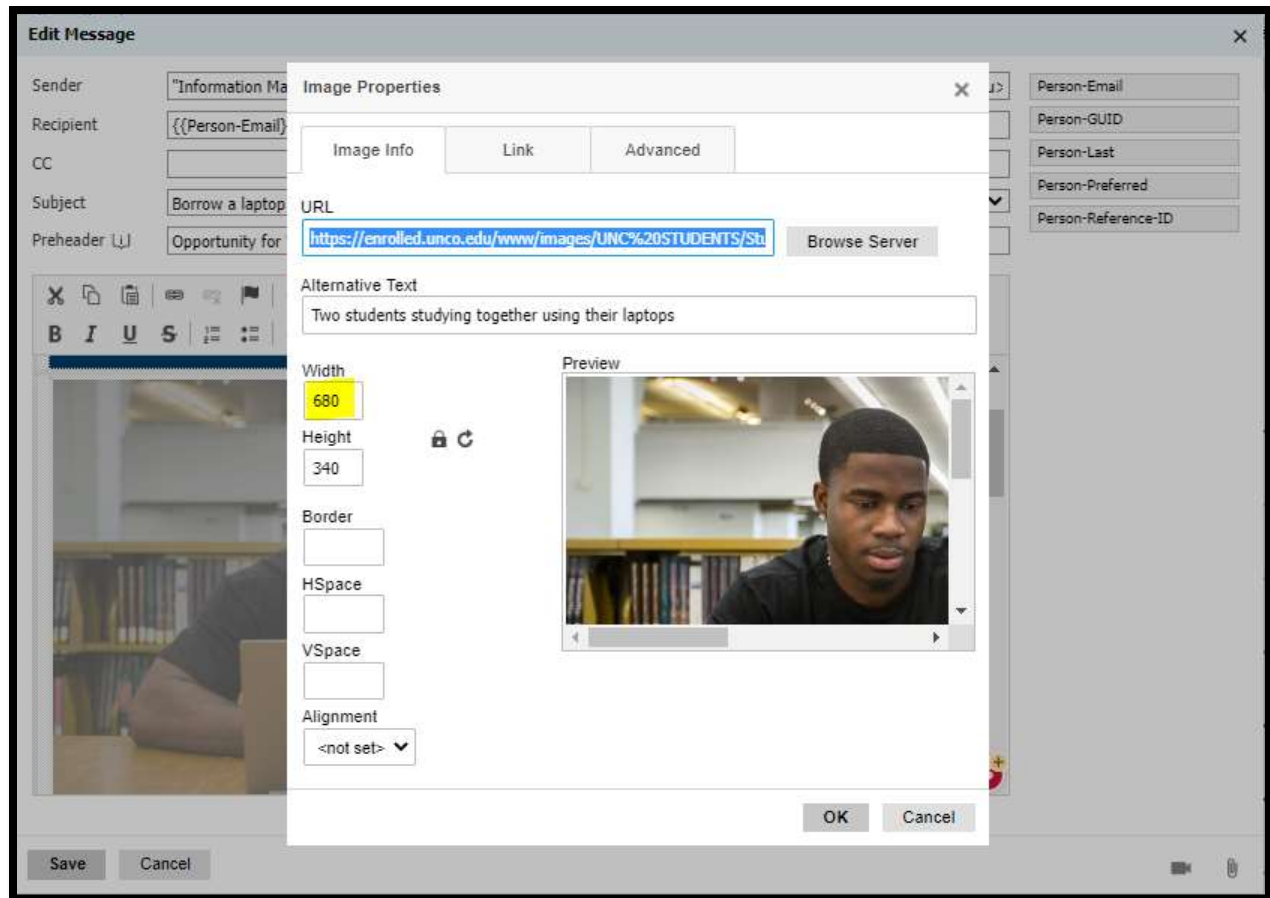
From the Image screen, select “**Browse Server**”. Click on “00-DEPARTMENTS” then your subfolder to find your images for use. If you can’t find the image you are looking for. Please submit the [Project Request Form](#).



Here you can choose from the images available on the server. Simply double-click the image you wish to use.

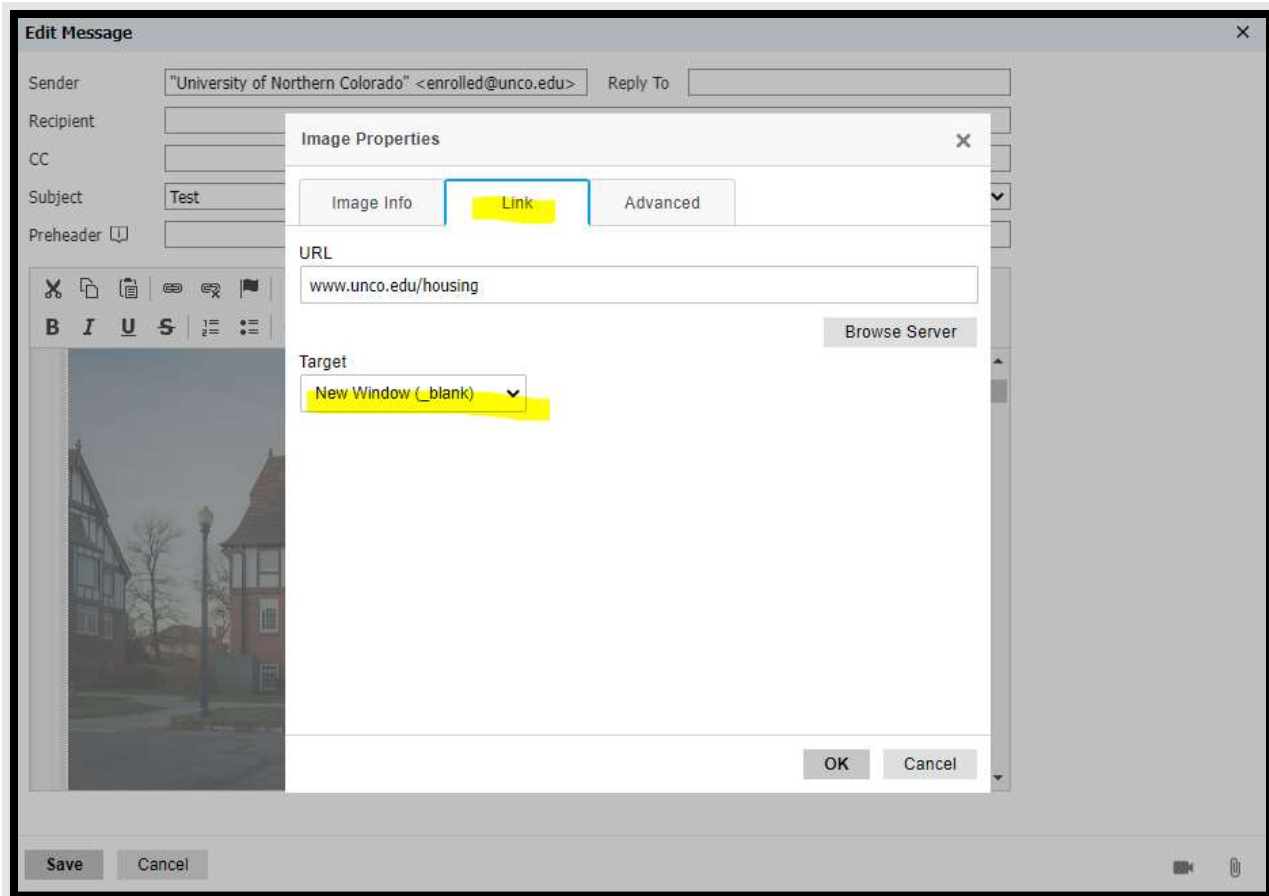
Once you have your image selected, you can adjust the **size** of it:

- For the header/hero/banner images, we recommend setting the width to **680px**, as this fits well on both desktop and mobile devices.
- For the two-column images, we recommend setting the width to **280px**.
- For the three-column images, we recommend setting the width to **167px**.



Make sure to select the **Lock** icon to keep the image dimensions proportional when you adjust them. Before you finish this screen, fill out the **Alternative Text** box. Alt text (short for alternative text) is text included in HTML code to describe an image on a webpage, providing context for search engine crawlers as well as for those viewing a page with a screen reader. Assistance technology reads this text if unable to display the image, so make sure it describes everything about the image as concisely as possible.

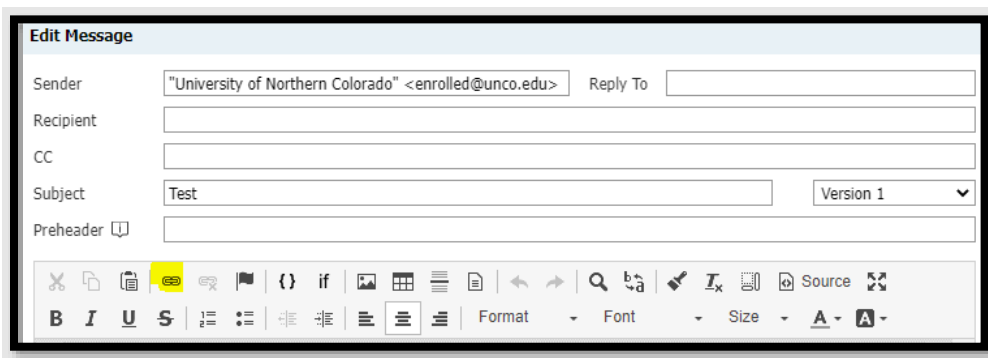
You can also link a webpage to your image. Simply select the link icon at the top of the Image Editor and **paste** the link you wish to use in the URL box. From the Target drop-down menu, we recommend you select the **"New Window"** option. This way, clicking the image opens a new tab on the student's browser.



Finally, click **OK** to insert the image in the message as configured.

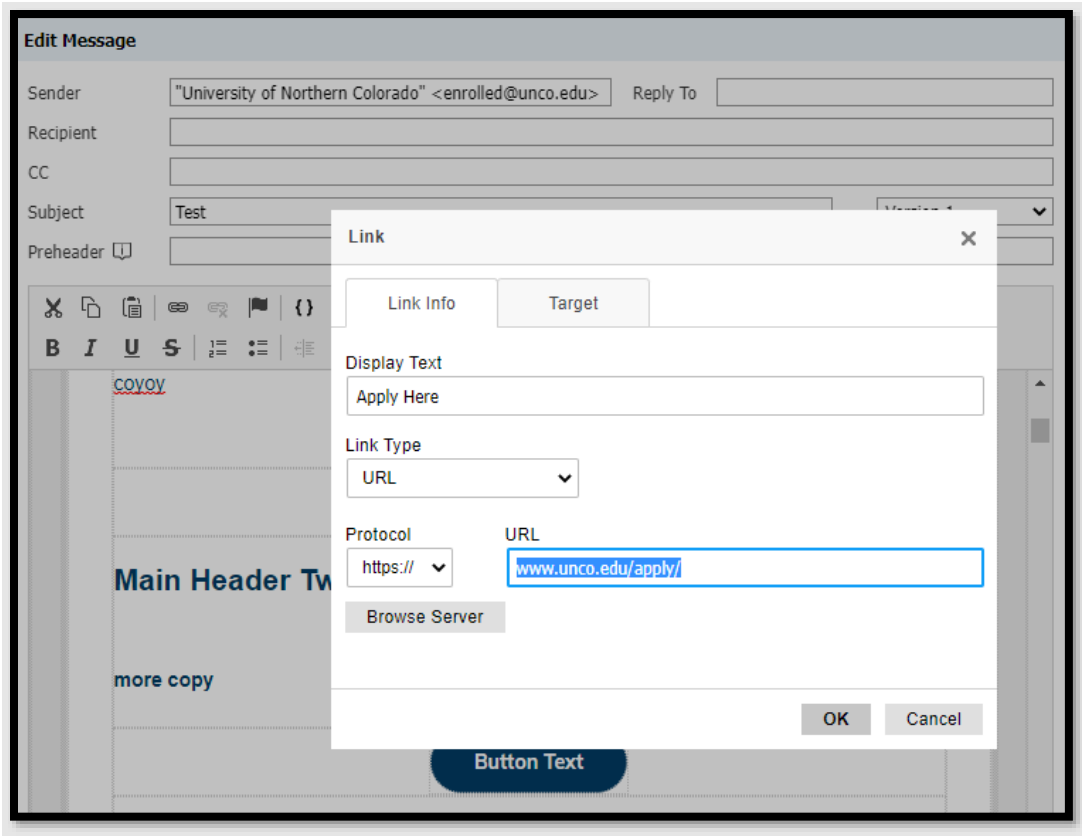
### Deliver Basics 6: Adding Links

In the Message Editor, **highlight** the text you wish to turn into a link. Then, select the **Link tool** from the toolbar.



In the Link tool, paste the URL you wish to link the text to.

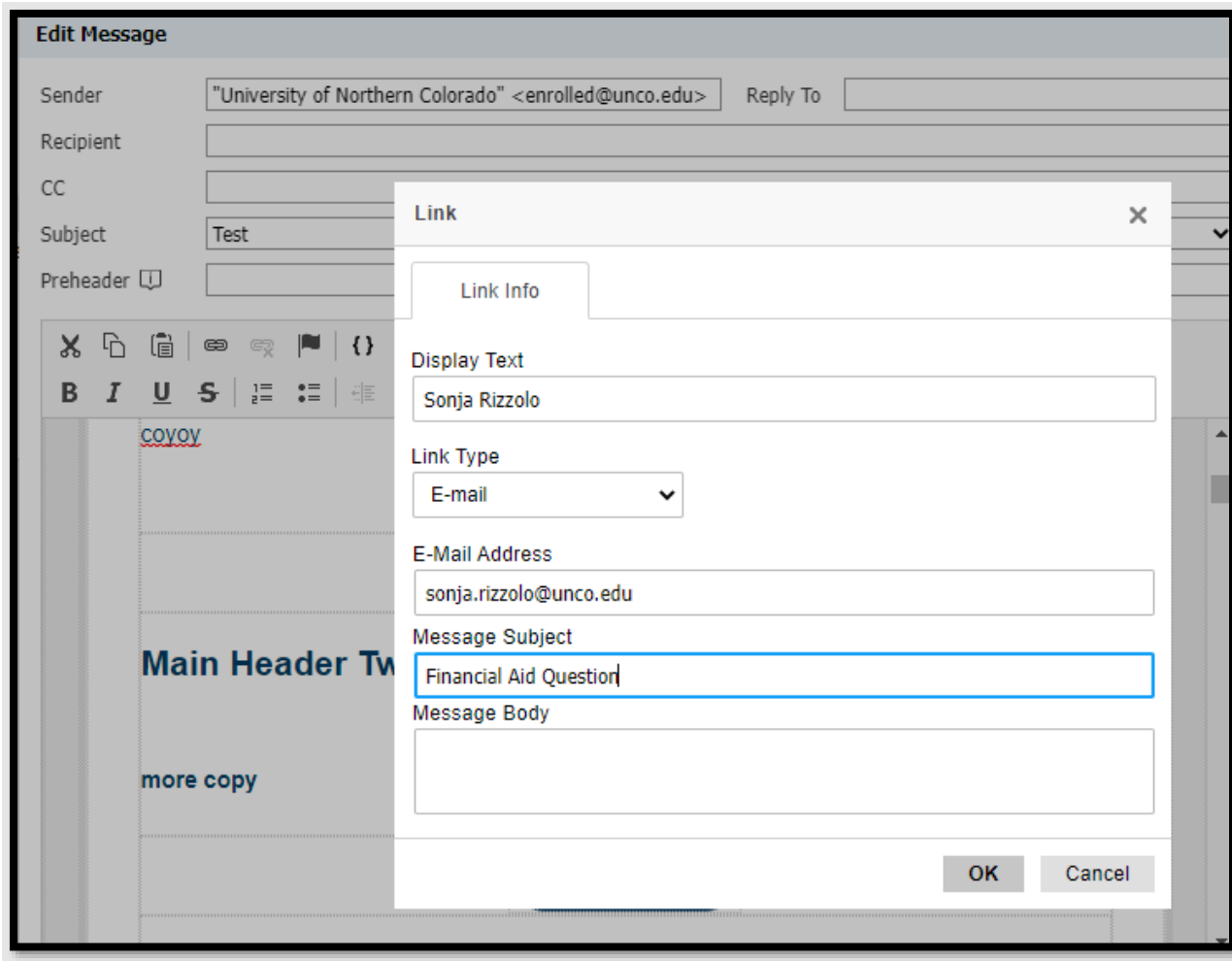




Before you close the link tool, we recommend you go to the Target tab and set it to **“New Window”**. That way, students who click the link will open the page in a new tab.



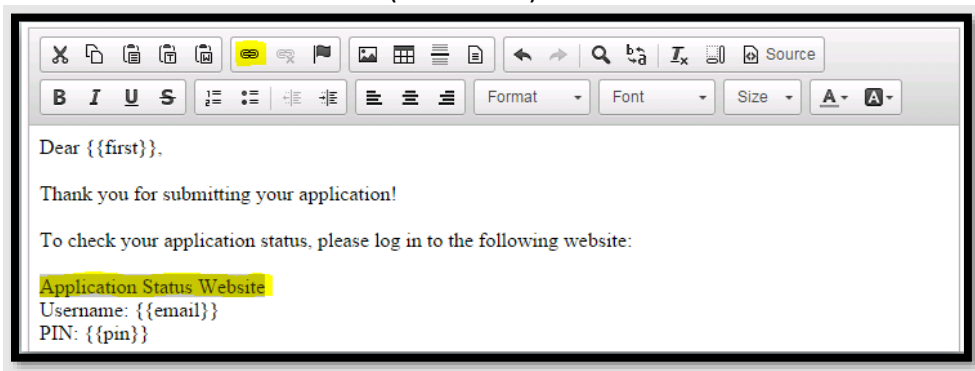
To create a link to an e-mail address, go to the Link Type drop-down menu and select **“E-mail”**.



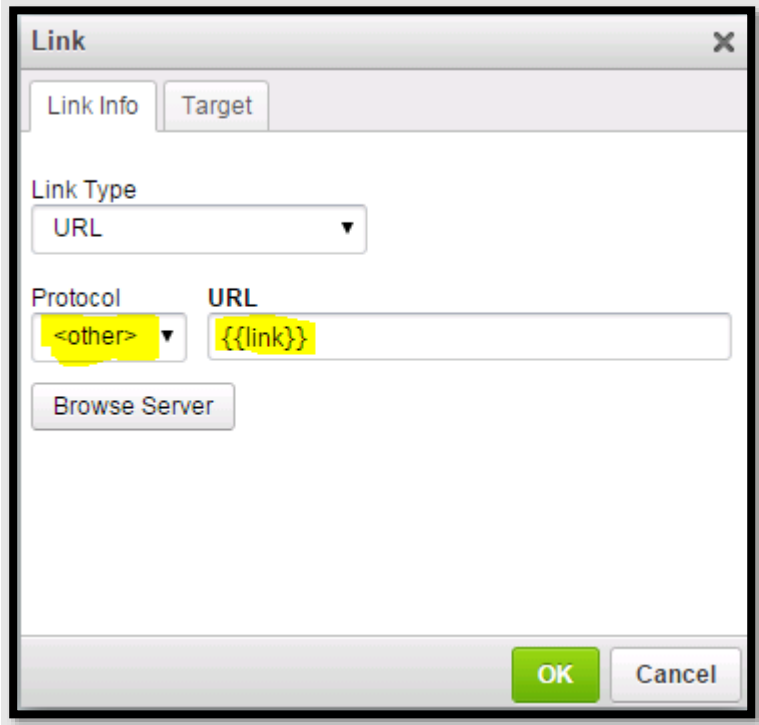
Select **OK** to save your link and settings.

You may want to link to a merge field like `{{link}}`, which contains a personalized login URL. Instead of simply placing the merge field as text in the message, which would result in a non-clickable link, you will want to hyperlink normal text (such as "Application Status Website") and link to the merge field.

1. Highlight the text (e.g., Application Status Website) that you want to hyperlink and click the link button in the toolbar (see below).



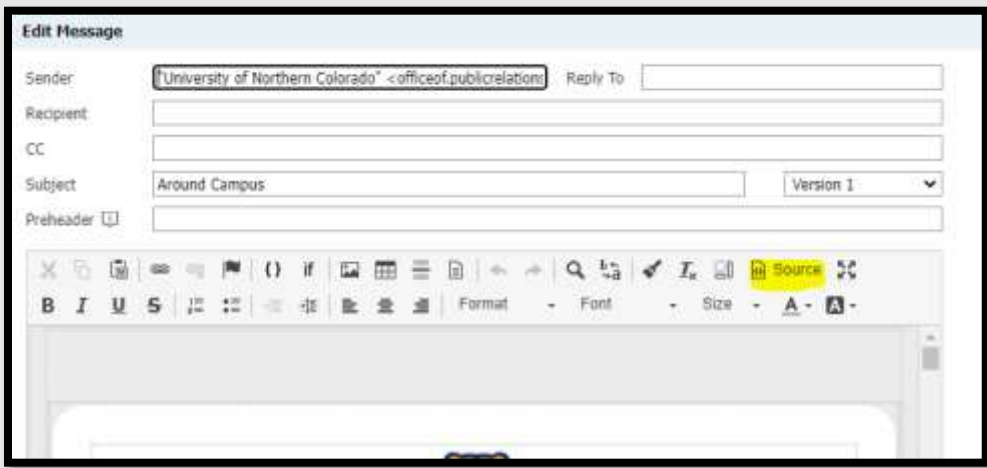
2. Select <other> as the “Protocol” and enter the merge field e.g., {{link}} as the URL. You must select <other> as the protocol if the merge field already contains the URL protocol, such as http://. If the protocol is left as http://, it will duplicate the protocol segment and will result in an unclickable URL.



The screenshot shows a 'Link' dialog box with two tabs: 'Link Info' and 'Target'. The 'Link Info' tab is active. It contains a 'Link Type' dropdown menu set to 'URL'. Below this, there are two fields: 'Protocol' and 'URL'. The 'Protocol' dropdown is set to '<other>' and the 'URL' field contains '{{link}}'. A 'Browse Server' button is located below the 'URL' field. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

### Deliver Basics 7: Editing the Source Code

You also have the option to edit the source code. The source code is the HTML and CSS code, so basic HTML knowledge is required. To open the **Code Editor**, click on the **Source Button**.

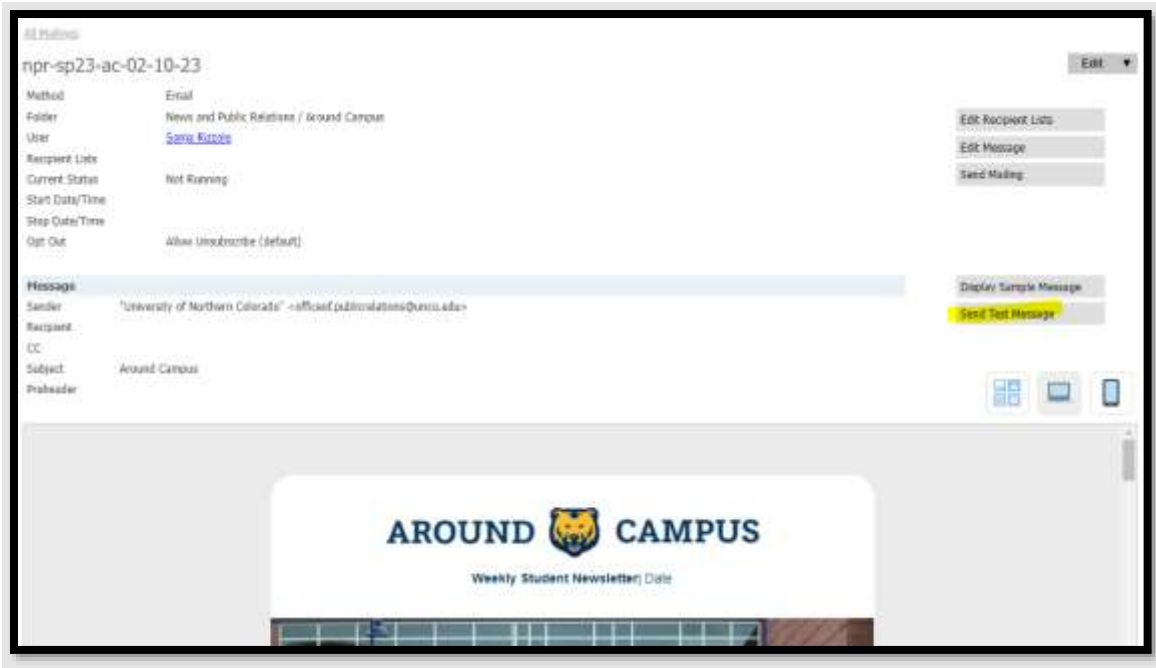


The screenshot shows the 'Edit Message' window. It has fields for 'Sender' (University of Northern Colorado - officeofpublicrelations), 'Recipient', 'CC', 'Subject' (Around Campus), and 'Preheader'. There is a 'Version 1' dropdown next to the subject field. Below these fields is a toolbar with various icons. The 'Source' button, which looks like a document with code symbols, is highlighted in yellow. Below the toolbar is a large text area for editing the message content.

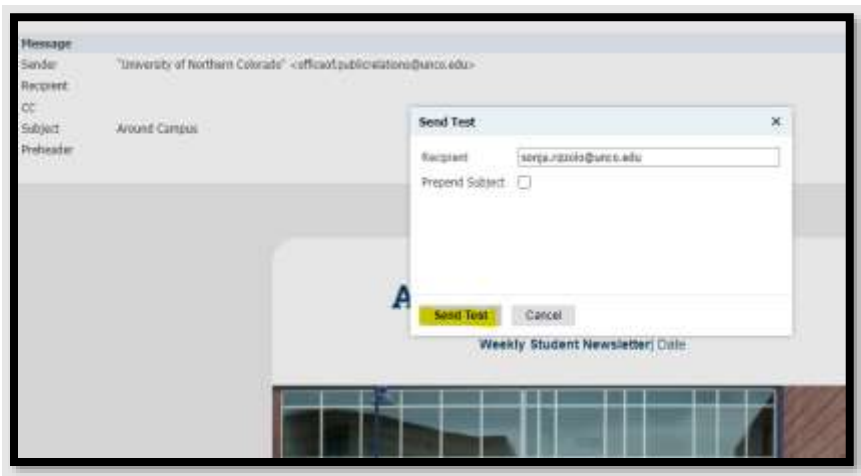
## Deliver Basics 8: Testing Messages & Displaying a Sample Message

Once you finish building your message, you'll want to test it before mailing it to all recipients. It is **extremely important to test**. Sometimes there are things in the Source Code that don't show on the preview screen that WILL show up when the email is sent.

Click the “**Send Test Message**” button.

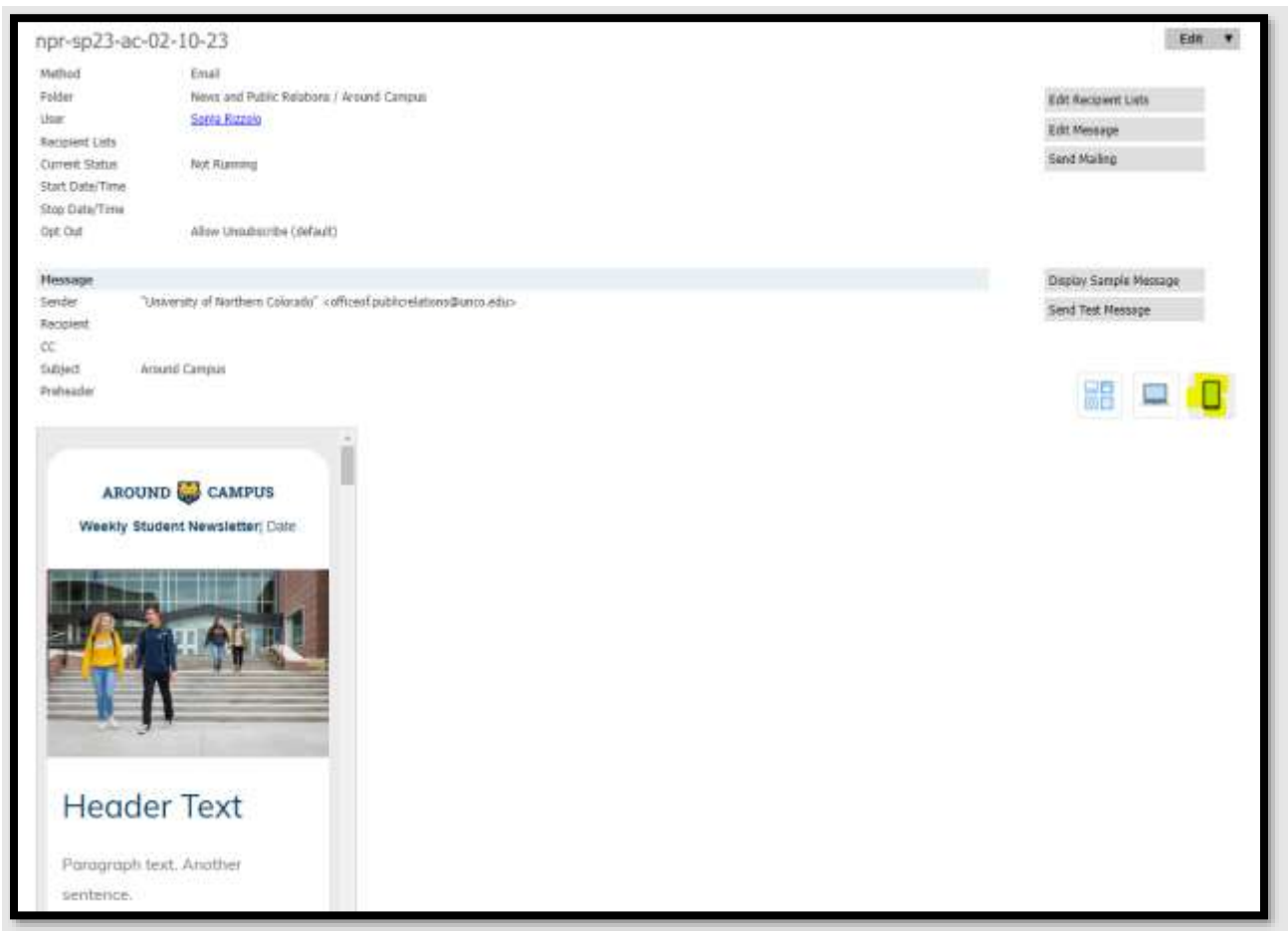


In the text box, enter your email address, and then click **Send Test**.



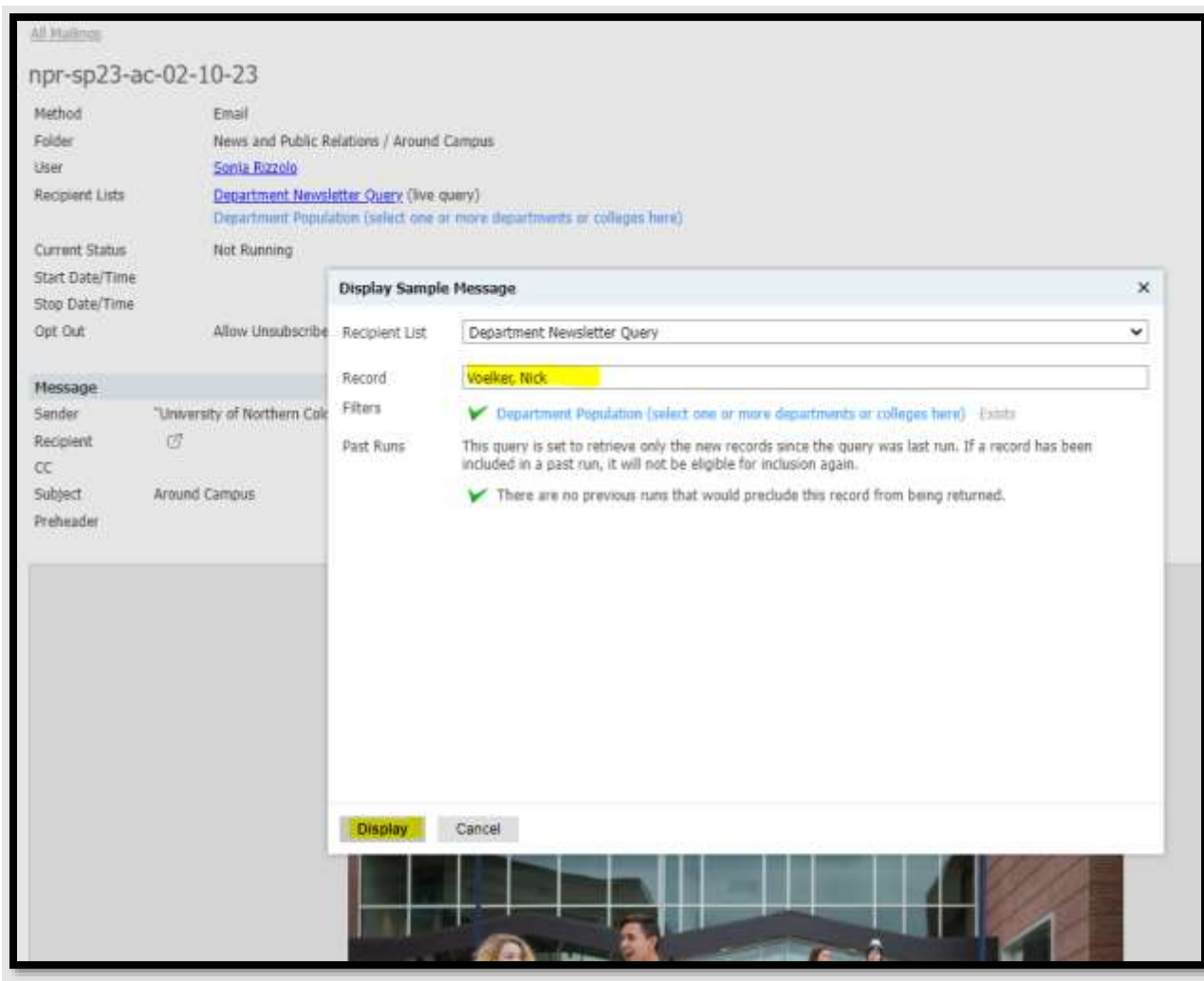
We recommend you send tests to at least two **different** email programs (Outlook, Gmail, Yahoo, etc.) to see how they may display your formatting. Also, open the email on your phone in addition to reviewing the “mobile preview” option in Slate.

Since most students check their email on their phones, Slate has a mobile preview button.



Once you are satisfied with your recipient list, you can **Display Sample Message** to see how the message will render for a particular record.

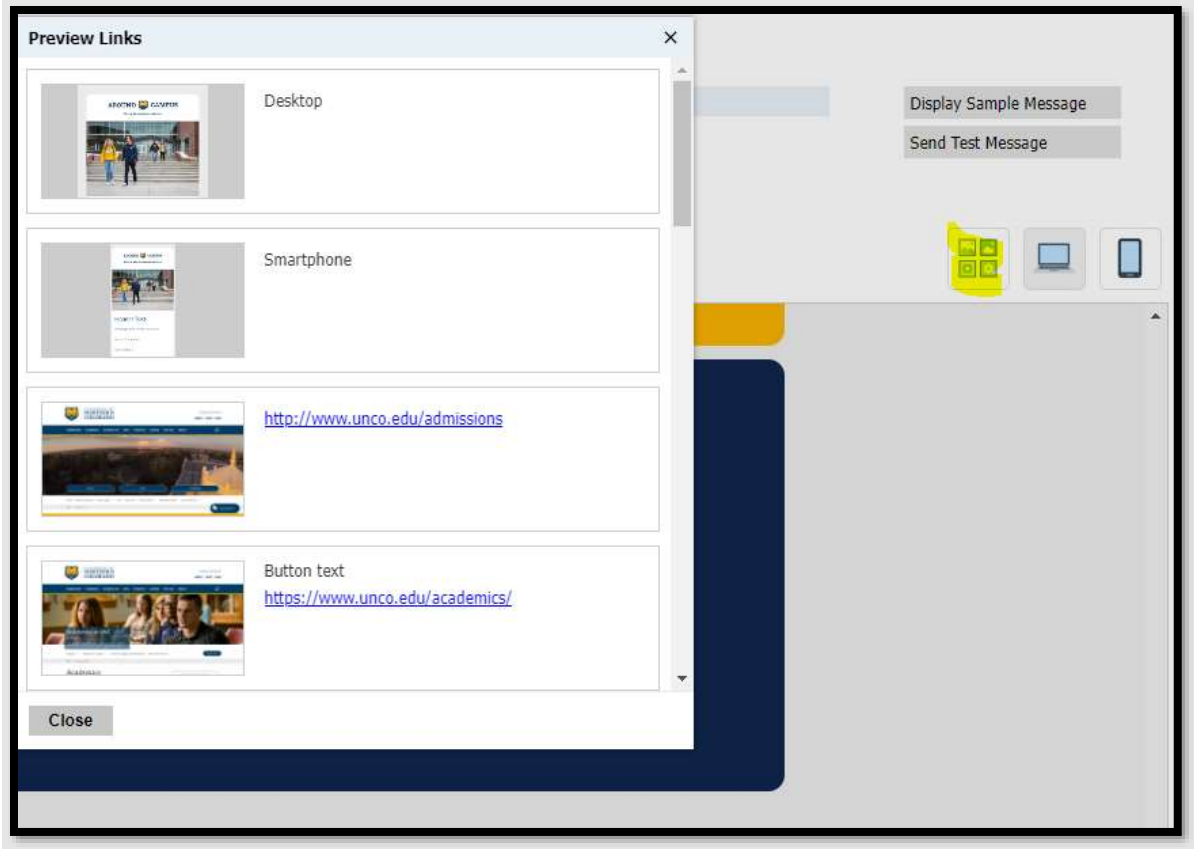
1. Click **Display Sample Message**.
2. Search for a record of who you think should get this mailing based on your recipient list. Slate will show you if they meet the filter criteria:



3. Click **Display** to see how the message will show up for that person. This is a great way to test any merge fields, liquid markup (LM) or conditional logic you have in the email. For the LM, test all the LM for every possible scenario. In many cases, the spacing needs to be adjusted in the code itself. If this is the case, refer to Step 7.

### Deliver Basics 9: Link and Image Checkers

Before you send, you will want to check to make sure that your links are not broken. Click the link check icon above the message, and Slate will check your links for you.



## Deliver Basics 10: Send Mailing

Once you have your recipient list and message set up as you want them and have tested your links, you need to configure the Send Settings. To start, click the “Send Mailing” button in the right-hand column, this will open the Send Settings pop-up.



The Send Mailing prompt controls all aspects of how your Mailing will be distributed. At the top, it runs a Pre-Flight Check to ensure there are no errors in your message. Make sure the text beside it is green. Pre-flight checks in orange do not prevent you from sending the mailing, but you should review the areas indicated in the pre-flight check to ensure that they do not cause your mailing to malfunction (e.g., blank merge fields, conditional logic or liquid markup failure, etc.) Pre-flight checks in red text need to be corrected before Slate will let you send the mailing. Click [here](#) for some of the most common pre-flight errors and their corrective action(s). After you have reviewed and addressed the Pre-Flight Checks, you can configure the rest of the Send Settings.

ofa-fa22-FAPSA-EMAIL 5-new-years-resolution-01-06-23

Method: Email  
Folder: Financial Aid / 2023-2024  
User: Holly Hobbs  
Route: Bear Central  
Recipient Lists: Population Query (live query)  
Current Status: Not Running  
Start Date/Time:  
Stop Date/Time:  
Opt Out: No Unsubscribe (disregard opt)

Message:  
Sender: "UNC Office of Financial Aid" <ofa@unc.edu>  
Recipient: schu3373@bears.unc.edu  
CC:  
Subject: Check off these New Year's resolutions  
Preheader: File your FAFSA and UNC Scholarship A

**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: 5,592 recipients eligible for immediate delivery.  
The recipient count is determined from the following lists:  
L. Population Query (live) - 5,592 recipients

Recipient Lists: Population Query (live)

Batch Size (optional): Send max  messages and suspend.

Review: ☐ This message is ready for review.

Outbox: ☐ Send to outbox and do not deliver automatically.

Ongoing: ☐ Continue running mailing indefinitely.

Start Date/Time:  Time:  Eastern Time

Deduping:  Send only one message/recipient

Delay Delivery: ☐ Delay delivery until a specific time.

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

REMEMBER, THE FAFSA IS



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

5,591 recipients eligible for immediate delivery.  
The recipient count is determined from the following lists:  
1. Population Query (live) - 5,591 recipients

Recipient Lists

Population Query (live)

Batch Size (optional)

Send max  messages and suspend.

Review

☐ This message is ready for review.

Outbox

☐ Send to outbox and do not deliver automatically.

Ongoing

☐ Continue running mailing indefinitely.

Start Date/Time

Time:  Eastern Time

Deduping

Delay Delivery

☐ Delay delivery until a specific time.

Send Mailing

Save Settings

Cancel

- Estimated Recipients:** Review the number of estimated recipients and make sure that it matches your expectations. If the numbers do not match your expectations, then go back into your recipient list(s) and review them. If you have any questions after reviewing your list(s), submit a [Slate Campus Support Form](#) for assistance.
- Ongoing:** Check this box if the message should be sent regularly in an ongoing manner. Otherwise, just leave it unchecked.
- Start Date/Time and Stop Date/Time:** Enter the date and time you want the message to start sending in the Start Date/Time area. Remember that the Start Date/Time is in **Eastern Time**, not Mountain Time. If you check Continue running mailing indefinitely, Slate will give you the option to enter a Stop Date/Time as well. The best practice is to review and edit your communications at least annually, so we recommend always setting a Stop Date/Time.
- Weekdays, Delivery Window and Deduping (see below):** This is where you set up the schedule. This area only shows up if you check Continue running mailing indefinitely.
  - Weekdays:** We recommend sending every day of the week, Monday through Sunday if you want Slate to send the message to new people in your Recipient List(s) every day.

- b. **Delivery Window:** Check the general timeframe you would like Slate to try sending the message. Remember that these are listed in Eastern Time. We recommend sending from midday to late afternoon, which is when students most frequently check their emails. DO NOT send a message overnight: 2:00am – 4:00am, because that’s when data is being imported from Banner.
- c. **Deduping:** Generally, you should choose “Send only one message/recipient.” If you have a use case for not deduping, please submit a [Slate Campus Support Form](#) with an explanation of what you are trying to do for assistance in setting that up.

Make sure the **Ongoing** box is checked if you are running an ongoing campaign. The message will keep sending indefinitely until an end date is selected.

The screenshot shows the 'Send Mailing' dialog box with the following details:

- 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:** 5,591 recipients eligible for immediate delivery. The recipient count is determined from the following lists:
  - 1. Population Query (live) - 5,591 recipients
- Recipient Lists:** Population Query (live)
- Batch Size (optional):** Send max [ ] messages and suspend.
- Review:** ☐ This message is ready for review.
- Outbox:** ☐ Send to outbox and do not deliver automatically.
- Ongoing:** ☒ Continue running mailing indefinitely.
- Start Date/Time:** [ ] Time: [ ] Eastern Time
- Stop Date/Time:** [ ] Time: [ ] Eastern Time
- Weekdays:** ☐ Monday, ☐ Tuesday, ☐ Wednesday, ☐ Thursday, ☐ Friday

Buttons at the bottom: **Send Mailing**, **Save Settings**, **Cancel**

Send Mailing

Review

☐ This message is ready for review.

Outbox

☐ Send to outbox and do not deliver automatically.

Ongoing

☒ Continue running mailing indefinitely.

Start Date/Time

02/07/2023

Time:

Eastern Time

In approximately 11.7 hours

Stop Date/Time

02/28/2023

Time:

Eastern Time

Weekdays

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☒ Saturday

☒ Sunday

Delivery Window

☐ Overnight: 2:00am–4:00am

☐ Morning: 10:00am–12:00pm

☒ Midday: 12:00pm–2:00pm

☒ Afternoon: 2:00pm–4:00pm

☐ Evening: 8:00pm–10:00pm

Deduping

Send only one message/recipient

Delay Delivery

☐ Delay delivery until a specific time.

Send Mailing

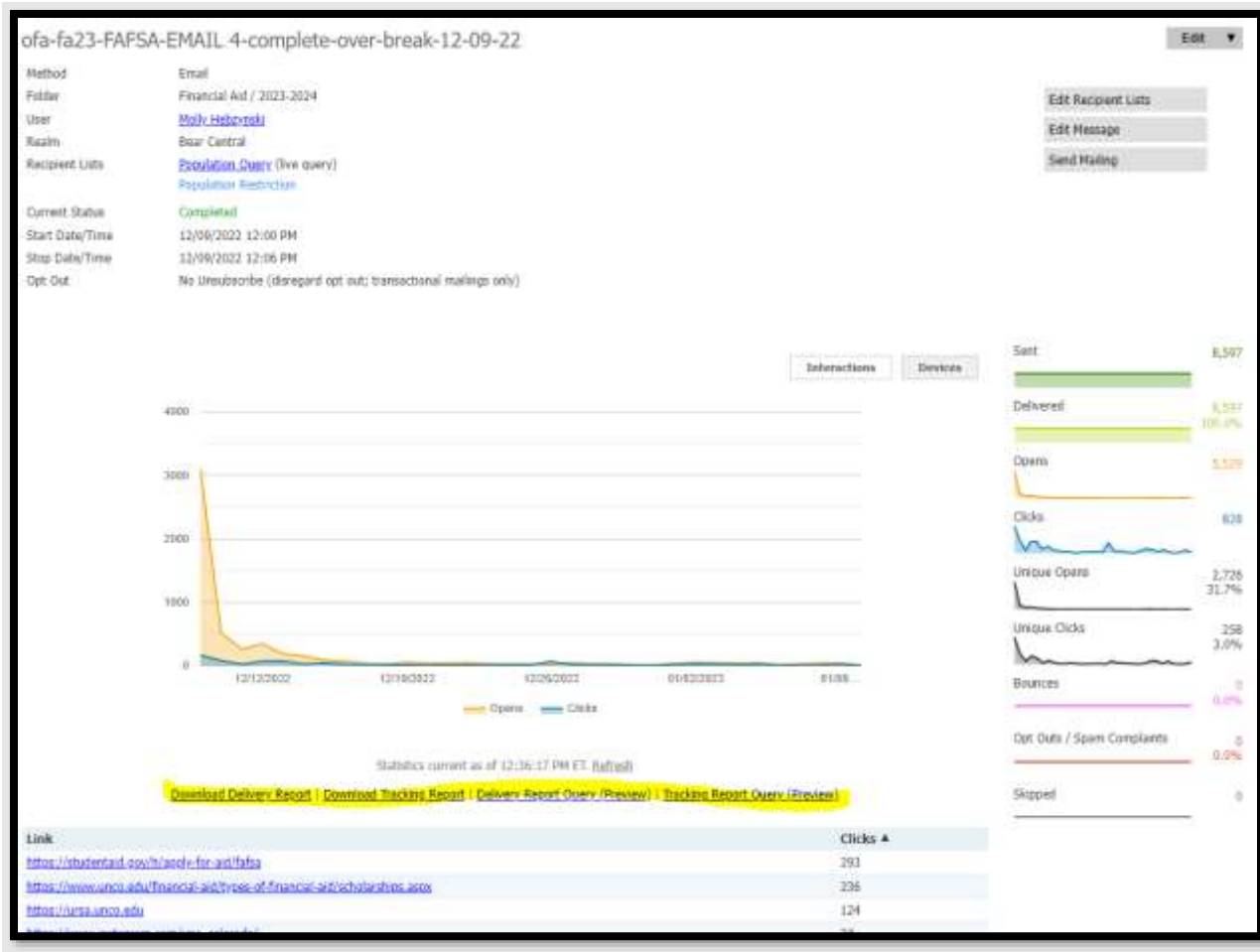
Save Settings

Cancel

**Note:** Adding a Stop Date/Time is optional. Leaving it blank will keep your campaign running until you manually stop it. The best practice is to review and edit your communications at least annually, so we recommend **always setting a Stop Date/Time**. You'll need to click the Green SEND MAILING button and then type the word SEND to activate the mailing. Only Slate users with the Department Communicator Role can SEND Slate communications. If you are unable to send a communication, please contact your department communicator.

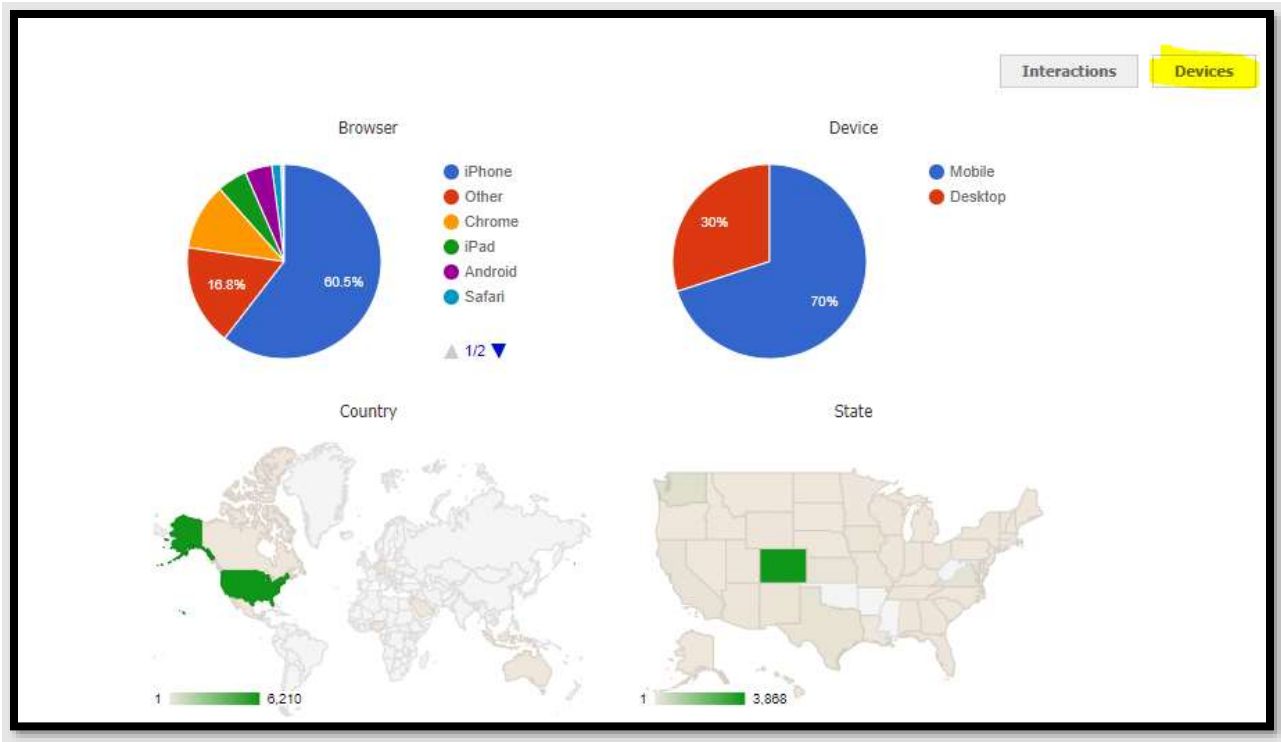
## [Deliver Basics 11: Delivery and Tracking Reports](#)

Once your email is sent, Slate will provide some important data.



The graph displays the number of Opens and Clicks over the period the message has been live. Slate automatically generates reports, which you can **download** using the links underneath the graph. The download comes as a Spreadsheet that displays the names, emails and statuses of the recipients. For more info on open/click tracking, click [here](#).

You can also access the Devices chart by selecting the **Devices** button. Here, you can view which browser the recipient uses and what device recipients open them on (computer, phone, etc.). This section also contains a map displaying which regions have received the most messages.

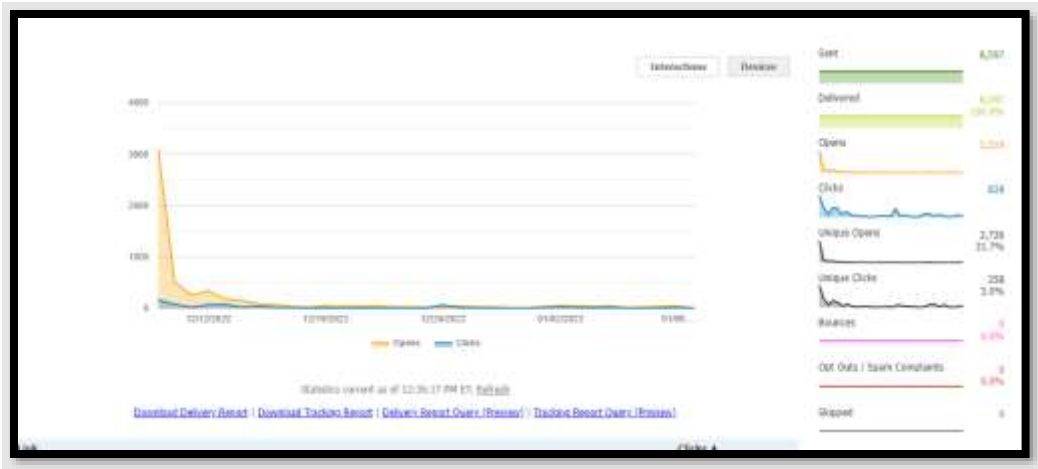


The links below the graph will download an Excel list of everyone who meets your recipient list requirements. The Delivery Report will show everyone Slate tried to send the mailing to and whether it was successful, bounced or failed for some reason. The Tracking Report will show opens and clicks.

**Important note:** These reports may not be immediately available upon sending your mailing. Please wait up to 24 hours to view the reports.

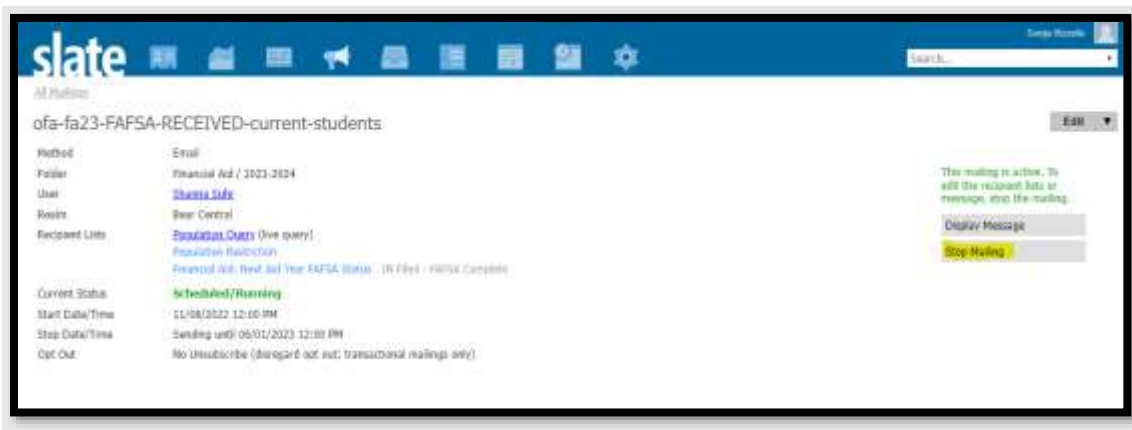
To set up additional reports, please submit the [Slate Campus Support Form](#).

The right-hand column displays how many messages have been sent, delivered, opened and clicked on.

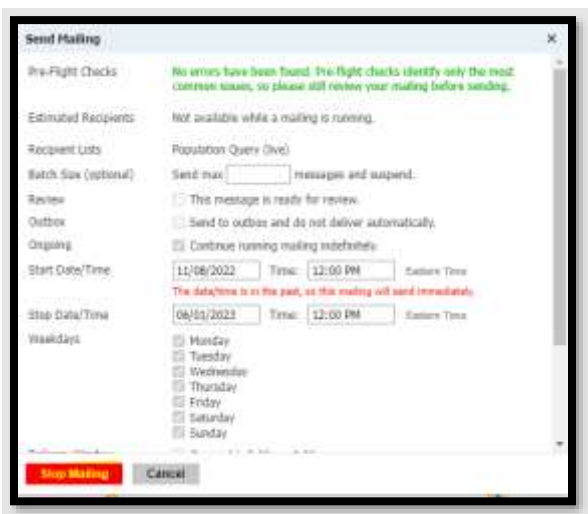


## Deliver Basics 12: Stopping a Mailing

To manually stop an ongoing message, select the **Stop Mailing** button at the top right.



Click on the red “Stop Mailing” button to stop the mailing and type the word STOP.

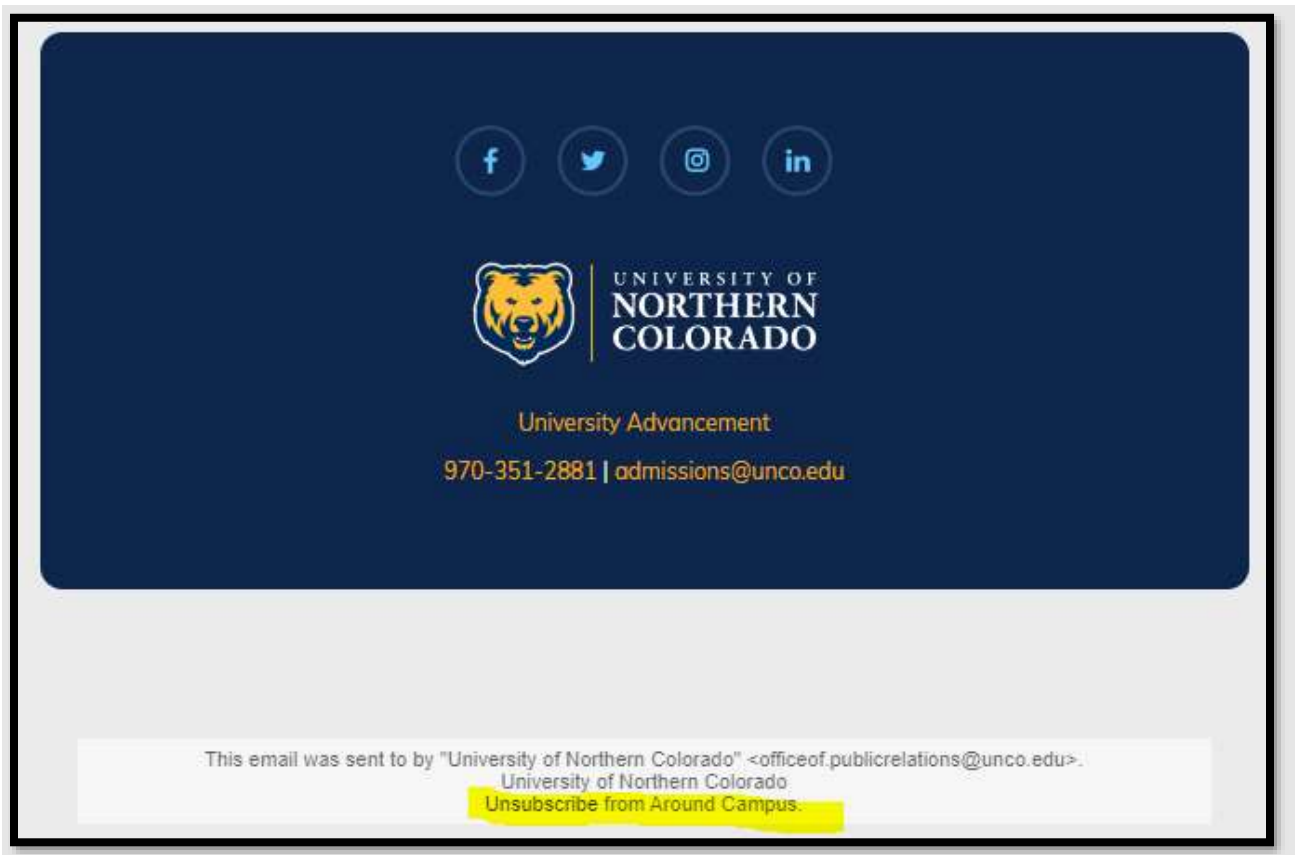


### Deliver Basics 13: Mailing Groups (Subscribe/Unsubscribe)

Slate Mailing Groups have been configured for each unit. Mailing Groups provide a way for students/employees to opt out of receiving mailings from a particular department/unit. Mailing Groups function like the “Opt Out” tag, but only for messages to which the user has assigned a Mailing Group.

For example, if someone unsubscribes from “Around Campus” group messages, then any message where the Opt Out setting is “Around Campus” will honor that person’s opt-out request and skip sending to that person.

The recipient sees the **Unsubscribe** link at the bottom of the message with the mailing group spelled out next to it:



Clicking **Unsubscribe** will give recipients the option to unsubscribe from just that group or to opt-out overall.

All unit-level marketing messages should be set up with the corresponding unit Mailing Group in the Opt-Out setting:

**Edit Mailing**

Name: test

Folder: Marketing and Communication /

User: Rizzolo, Sonja

Realm:

Method: Email

Opt Out: Around Campus

UTM Tracking:

Hide from Timeline:

View In Browser:

Save Delete Cancel Archive

Opt Out options:

- Around Campus
- Allow Unsubscribe (default)
- Around Campus
- Media Weekly**
- UNC Today
- No Unsubscribe (disregard opt out; transactional mailings only)

This should apply to **every marketing message**, regardless of the person's status (Student or Employee). Transactional messages such as "Register for classes" are coded as "No Unsubscribe." These messages will be sent regardless of the person's opt-out status.

Mailing Groups are queryable.  
Export:

**Insert Query Part**

Search: mailing group

Groups: ☒ Pinned Exports ☒ Local Exports ☒ Slate Template Library

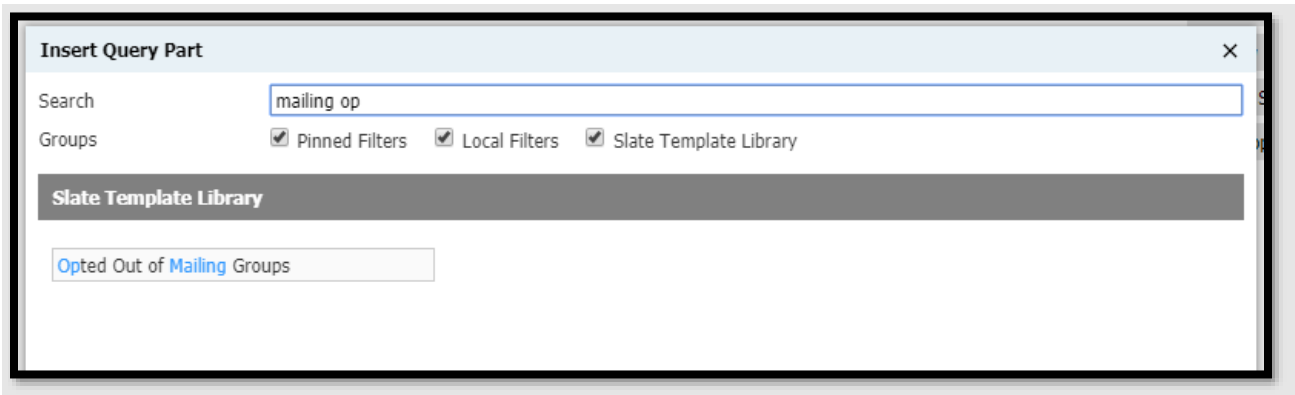
**Slate Template Library**

Record Details

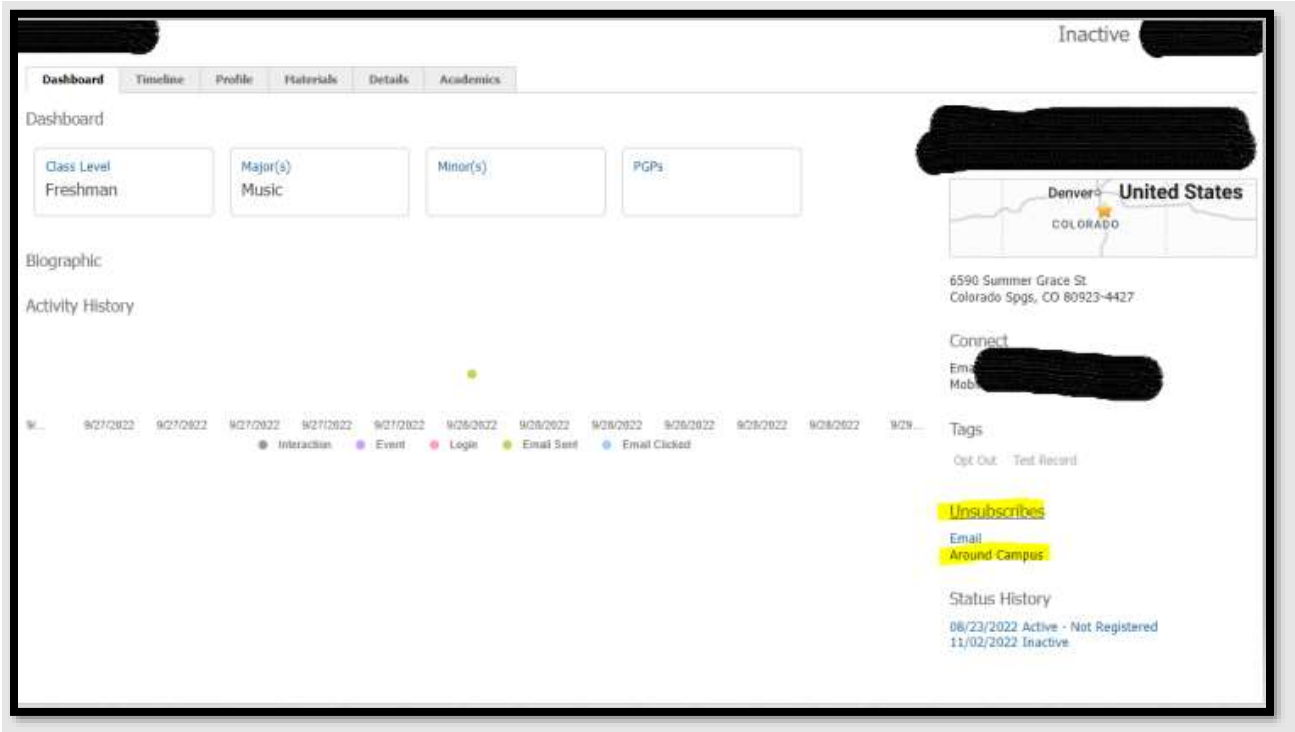
**Mailing Opt Out Groups**



Filter:



How to Tell Whether a Record Has Opted Out of a Mailing Group:



The “Unsubscribes” will only surface on the record *if* they have opted out of one or more mailing groups. If they have not opted out of any mailing groups, you won’t see any “Unsubscribes.”

Deliver Basics 14: Deliver Troubleshooting

Click [here](#) for some frequent questions related to email.

## Best Email Practices

**Message Triggers:** messages can be sent based on certain triggers e.g., the student applied for graduation, the student registered for courses, etc. Having multiple emails running to different groups of students can greatly increase your student interactions.

**Reports:** analyze your reports to learn which of your emails are generating the most student interaction. This can serve as a guide for future campaigns and inform you on how to adjust your current ones. If you need help creating a report, please submit the [Slate Campus Support Form](#).

**From Name and Address:** 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.” From Address: Use the official email address of your department, office or unit. For example, [libraries@unco.edu](mailto:libraries@unco.edu) or [bursar@unco.edu](mailto:bursar@unco.edu). For example, “Division of Diversity, Equity and Inclusion” [equityandinclusion@unco.edu](mailto:equityandinclusion@unco.edu).

**Subject Lines:** try to make these less than 50 characters. Anything greater than that length is less likely to be opened.

**Banner Sizing:** the ideal image width is 680px for responsive emails from Slate. Check the Adding Images section to learn how to adjust sizing.

**Links:** make sure to set each of your links to open in a new window. This prevents the student from being directed away from your message. For information on how to set this up, refer to the Adding Links section of the guide.

**Call to Action:** we recommend using a direct call to action in every email. Instruct or ask the student to do something “now” or “today”. This keeps the reader engaged in the process and allows the email to provide a valuable function.

**Message Length:** 125 words is the ideal message length. Cell phone screens can only fit so many words before the student has to start scrolling, and more scrolling means students are less likely to read the entire message.

**Signatures:** keep them simple – name, position and department name. Long signatures require students to scroll more, making them less likely to finish reading it. Also, avoid using handwritten signatures -- it makes the messages appear more formal and outdated.

## Accessibility

Creating accessible emails means that the content and functionality of an email can be easily accessed by everyone, regardless of ability. Small changes can have an impact on making your emails more inclusive and increase readability and performance. We highly recommend you use templates specifically created for your unit/department. These templates are accessible and adhere to UNC's branding guidelines. Here are 11 easy tips for improving accessibility with your Slate emails:

1. **Left-justify your copy, especially for longer sections.** The start of a new line acts as a visual anchor. Keeping the anchor in the same place makes it easier to track copy and keep it readable.
2. **Use a minimum font size of 14 points.** Making it 14 points or larger makes it easier to read, regardless of the screen size. For font, use Tahoma or Arial.
3. **Keep the contrast between elements high.** Contrast is usually the color of the copy and its background. For example, the color of the text on a button. If the contrast is too low, it can be challenging to read for people with low vision. You can use color, font weight and font size to control contrast. When in doubt, [check your contrast](#) with this free contrast-checking tool by WebAIM. For example, DO NOT use a combination of yellow and white. Do use a combination of blue and white.
4. **Make text links distinct from surrounding text.** There is a reason that the default for a link is underlined blue text. Take care with overriding this styling, especially with the underline. Removing it makes it difficult for people who are color blind.
5. **Make buttons and calls to action large** enough with sufficient white space around them. Doing this makes it easier for people to access your links. And, putting links too close together can cause accidental link taps and frustrate users.
6. **Keep your email layout simple.** A clean, simple layout also aids in accessibility. Single-column layouts are the most effective – they streamline content, reinforce the design hierarchy and make it easier to adjust across screen sizes and to scan. Use a branded template provided in Slate by central marcom to ensure a clean layout.
7. **Add alternate text to non-text content.** Adding alternate or alt text to non-text content, such as photos and graphics allows the content and function to be read by screen readers and is displayed in place of the image if the image file is not loaded or users have chosen not to view images (this often occurs with emails sent to unco.edu). A few tips when writing alt text: Be accurate in describing the content and function of the image. Keep it short. Usually, a few words or a short sentence is sufficient. Don't be redundant with the text within the context of the image. Don't add that it is an image or photograph in the description unless it's relevant. For UNC logos, the alt tag is: University of Northern Colorado logo. If you're interested in learning more about how and when to use alt text appropriately, [WebAim](#) provides a more comprehensive explanation.
8. **Keep language simple.** Keep sentences short and easy to understand, so readers can focus on the content. Also, avoid the use of jargon, abbreviations or insider language. Readers may not know the meaning of words or phrases we use frequently in our work,

so review your copy for jargon and rephrase it so it's easily understood by a wide audience. Also, keep your emails short to improve readability.

9. Use **appropriate headings**. Use appropriate heading tags to organize your content into a logical hierarchy. This helps users with screen readers to understand the structure of your content.
10. Use **descriptive link text**. Use descriptive link text that explains the content of the link, rather than generic phrases like "click here." This helps users with screen readers to understand the purpose of the link.
11. Provide **captions for videos**. Provide captions or transcripts for all videos. This helps users with hearing impairments to understand the audio content.

Interested in learning more about accessibility? [Visit this blog](#) by Email on Acid.