PURDUE UNIVERSITY | The Graduate School

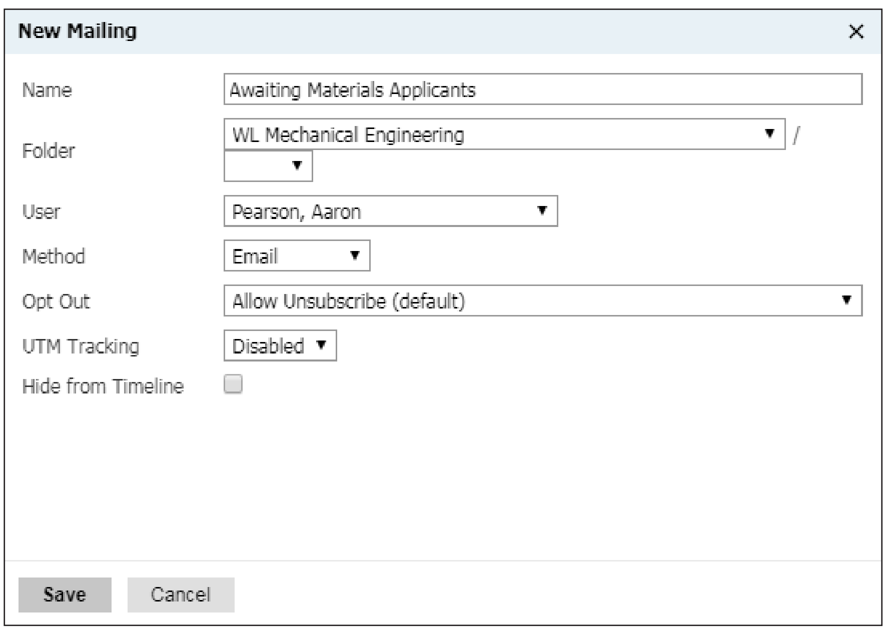
slate -- Deliver

1. Please use the Google Chrome web browser, and log in to https://www.gradapply.purdue.edu/manage

2. Click the fourth icon from the left. This will take you to Deliver.

3. Here, you can create a new message/Email by clicking the ‘New Mailing’ button at the top left of the screen.

4. A dialog box will appear. Next to Name, type in a name for your message. Next to Folder, select your program. Make sure your name appears next to User. Click ‘Save.’


New Mailing

Name	Awaiting Materials Applicants
Folder	WL Mechanical Engineering /
User	Pearson, Aaron
Method	Email
Opt Out	Allow Unsubscribe (default)
UTM Tracking	Disabled
Hide from Timeline	

Save Cancel

5. Now, you will define the recipient list. Click the ‘Edit Recipient Lists’ button. You can either upload a spreadsheet by clicking the ‘Upload Spreadsheet’ button or utilize a query to send messages to prospective students or applicants that are within Slate by clicking the ‘New Query’ button.

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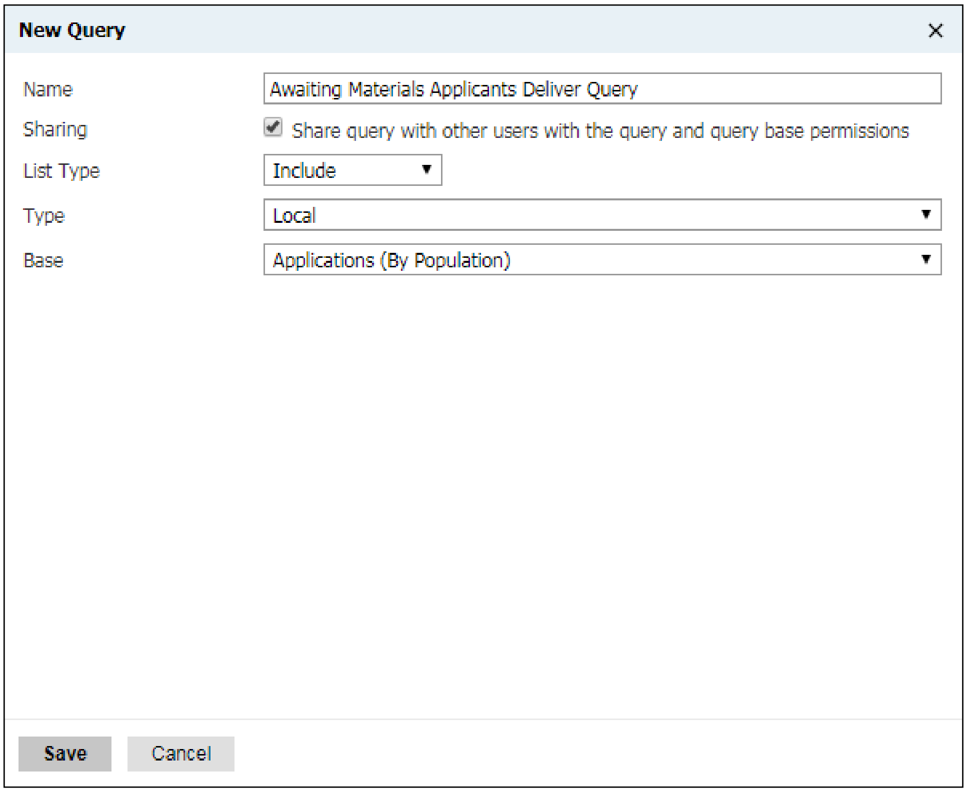
Our example is using a query (if you are uploading a spreadsheet, skip to step 14). Click ‘New Query.’ A dialog box will appear. Next to Name, type in a name for the query that is conducive to the name of the mailing. Check the box next to Sharing. List Type should be Include. Type should be Local. Next to Base, select ‘Prospects’ if you are targeting prospects who are not yet applicants or select ‘Applications (By Population)’ if you are targeting applicants. In out example, select the Applications (By Population) query base.



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Click ‘Export’ to add exports to your query. You will always need to select the Email export. Type ‘Email’ in the search box (you will probably need to click ‘Next’ at the bottom right). Scroll through the list until you see the Email export. Click on ‘Email’ which is located under the Common Prospect Fields heading. Now, we will add the prospect/applicant first name as an export. Type ‘First’ in the search box. Scroll until you find ‘First’ (located under the Common Prospect Fields heading) and click on it. Now, click the ‘Continue’ button at the bottom left of the screen.

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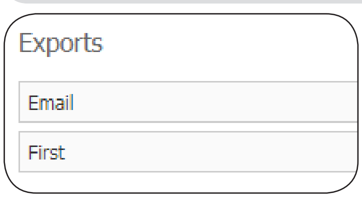
You should now see the Email and First fields under Exports.



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The next page in this training guide is a list of common query filters which are used to identify your message audience. Please note that some of these filters are query-base specific. For example, you will not find the PWL Applicant Research Area filter in the Prospects query base.

Common Query Filters

Applicant Term/Year: Finds applications with a particular entry term

Applicant Course Delivery: Finds distance vs on-campus applications

Application Status: Finds applications in a particular status:
• Awaiting Submission: in-progress applications
• Awaiting Payment: applications that have not yet paid
• Awaiting Materials: submitted applications that have items missing from their checklist
• Awaiting Decision: submitted applications whose checklist is complete; faculty review
• Awaiting Release: short-term status; a decision has been assigned, but not yet released to the student.
• Decision Released: A decision has been released to the student. This does not mean the student has been admitted!! A decision may be admitted, denied, or any one of the other decision codes.

Bin: Finds records in a particular reader bin

Decision (Released): A decision has been released to the applicant
• Admitted, Deferred Admission, Denied, Enrollment Accepted, Enrollment Declined, Withdraw/Cancel

Decision (Received): The decision has been viewed by the applicant. Finds applicants with a particular decision that has been assigned to the student. Decisions include:
• Admitted, Deferred Admission, Denied, Enrollment Accepted, Enrollment Declined, Withdraw/Cancel

PWL Applicant Degree Objective: Finds applications for a particular degree objective. The choices will include all areas for the campus, not just your own program.

PWL Applicant Research Area: Finds applications for a particular research or study area. The choices will include all areas for the campus, not just your own program.

Person Status: Located under the Prospect part of the filter drop down, Person Status lets you identify prospects, inquirers, or applicants. This is most helpful when running a Prospect query.

Interaction Code: Finds prospects who have been imported into Slate

Checklist Material Status: Finds applicants based on whether they have received or are missing checklist materials (do not use for recommendation letters or transcripts)

Checklist Status by Section: Finds applicants based on whether they have received or are missing either recommendation letters (Section: Reference) or transcripts (Section: Transcript).

Application Status Change Date: Finds applications based on when they changed application statuses. This filter can be used in Deliver with ‘today-#’. ***Additional information regarding ‘Change Date’ filters can be found at the end of this training guide.**

Status Change Date: Finds prospects based on when they changed person statuses. This filter can be used in Deliver with ‘today-#’. ***Additional information regarding ‘Change Date’ filters can be found at the end of this training guide.**

Inquiry Program of Interest: Finds prospects based on the program of interest they listed on the inquiry form

Unsolicited Program of Interest: Finds prospects based on the program of interest they listed, most likely at a recruitment

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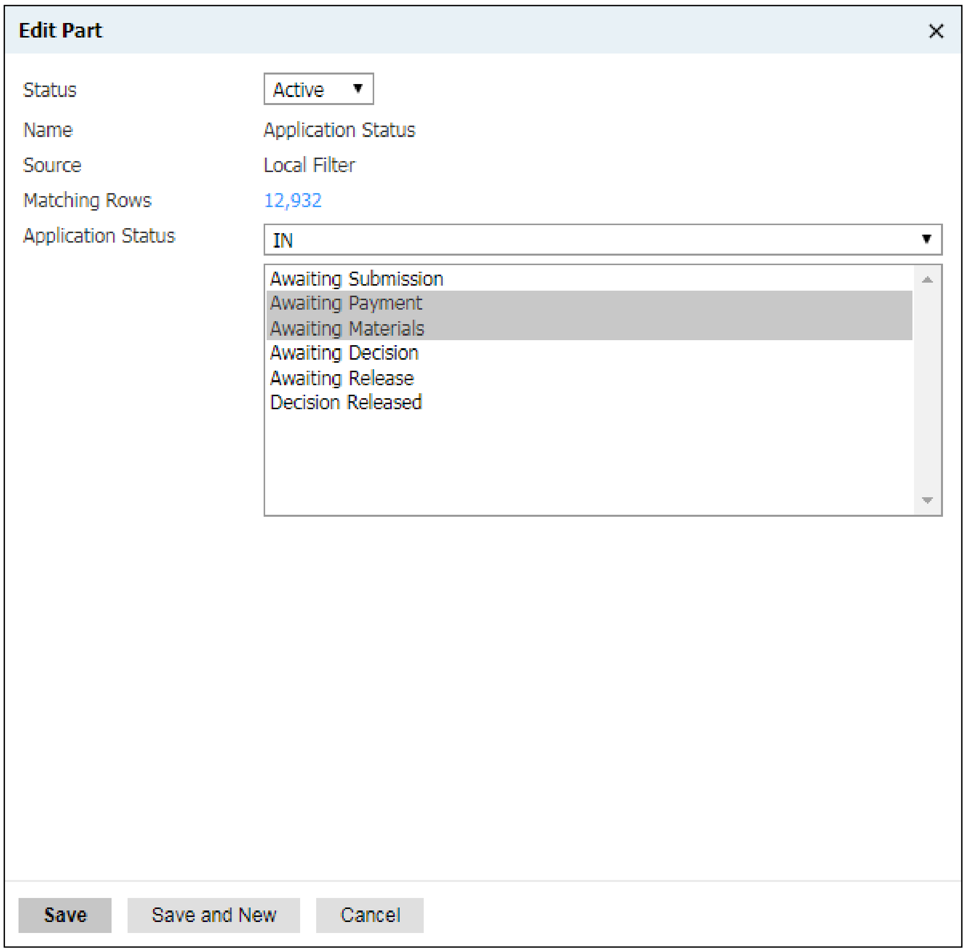
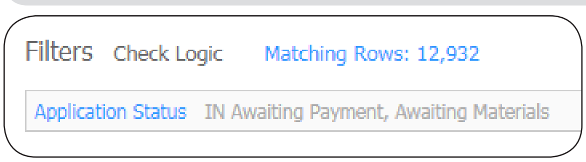
10 To add filters to your query, click the ‘Filter’ button located near the bottom right of the screen. You can search for filters like you search for exports; however, you cannot select multiple filters all at once. You must search and select 1 filter, and then click the ‘Continue’ button that is located near the bottom left of the screen. (In our example, click the ‘Filter’ button, type ‘application status’ and click on Application Status under Local Filters. Click continue.)

11 Once you click continue, most likely, another dialog box will appear. Here, you will select all of the appropriate options. In this example, we have chosen the ‘Application Status’ filter. We will leave IN next to Application Status. This can be changed to NOT IN depending on what population you are targeting. Hold down the Ctrl key on our keyboard to select multiple options. Select Awaiting Payment and Awaiting Materials. Then click the ‘Save’ button.



12 You will see all of your filters under ‘Filters.’ Matching Rows will display the number of message recipients. This is how we would interpret the Application Status filter that we added to this query: “We want to send this message to applicants who have an application status of Awaiting Payment or Awaiting Materials.” For a more in-depth review of the query tool, please reference the query training guides that are located on our internal site which is referenced in the footer of this document.



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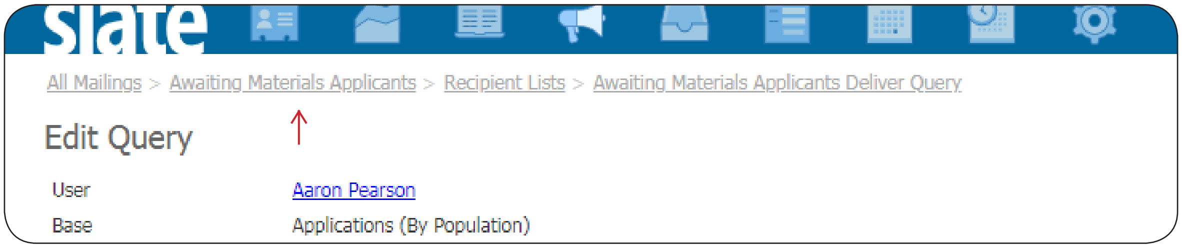
Once you are satisfied with your query, utilize the breadcrumbs near the top of the screen to go back to your Deliver message.



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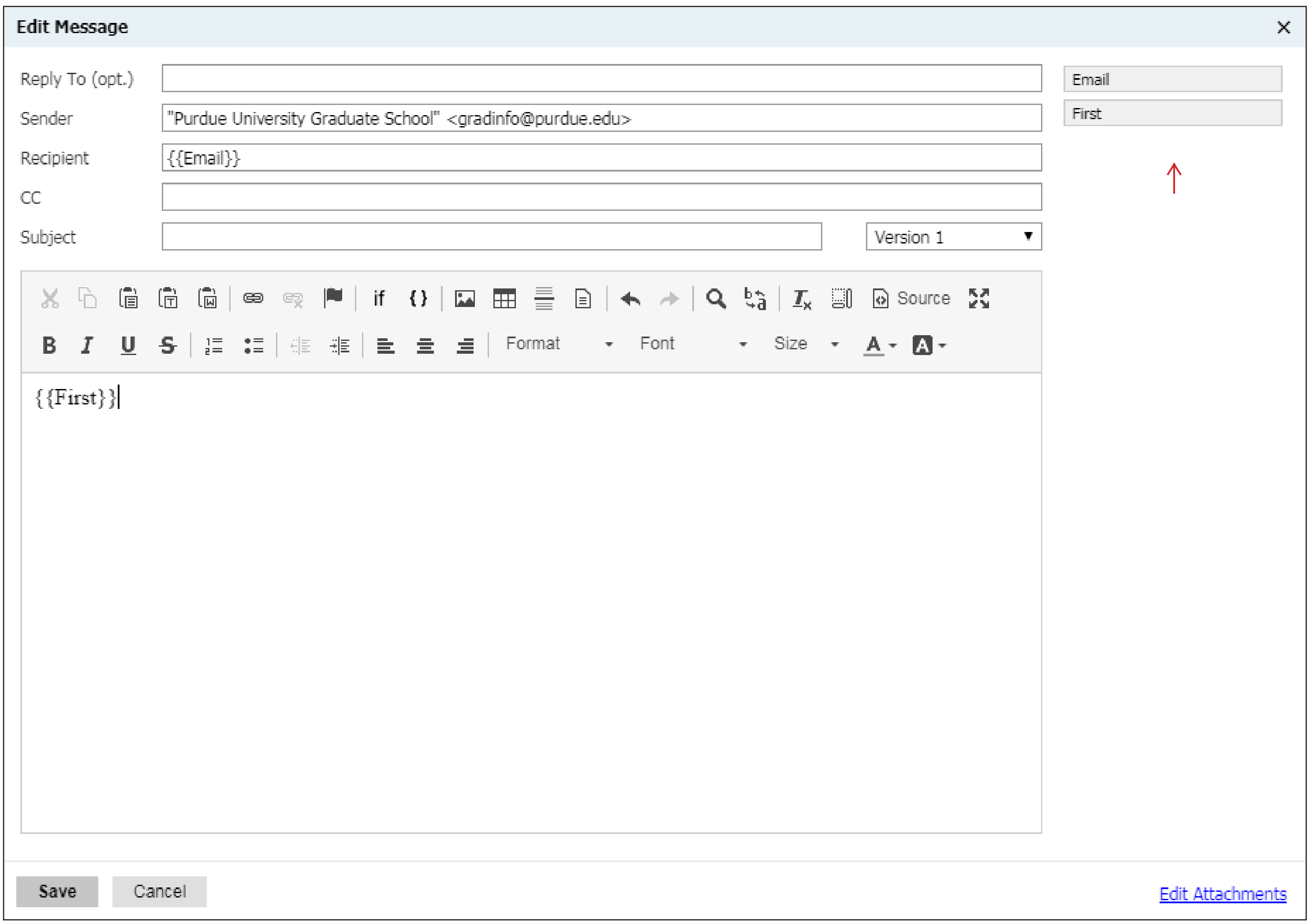
Now that you have your message audience, you will want to start creating message content. Click the 'Edit Message' button located near the top right of the screen. A pop-up will appear (below). You will notice that the exports that you placed in your query are located at the right. You will need to use the Email export. Click into the Recipient text-box, and then click the Email export. If you would like to dynamically display the recipients first name in the message, click into the message content area and click the First export. Don't forget to change the Sender information and add a Subject.



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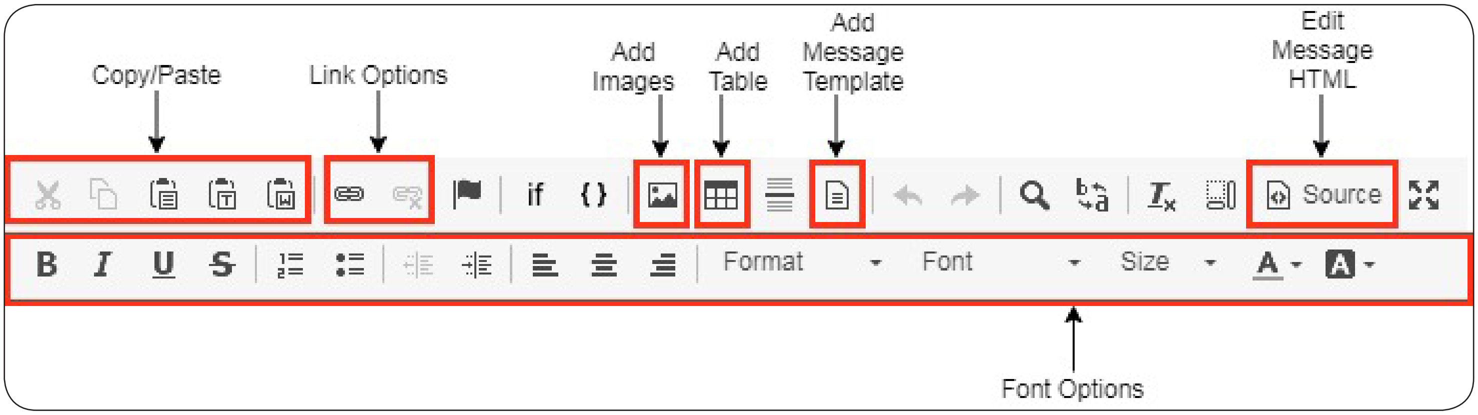
Message formatting toolbar:



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Once you are satisfied with your message content, click the ‘Save’ button.

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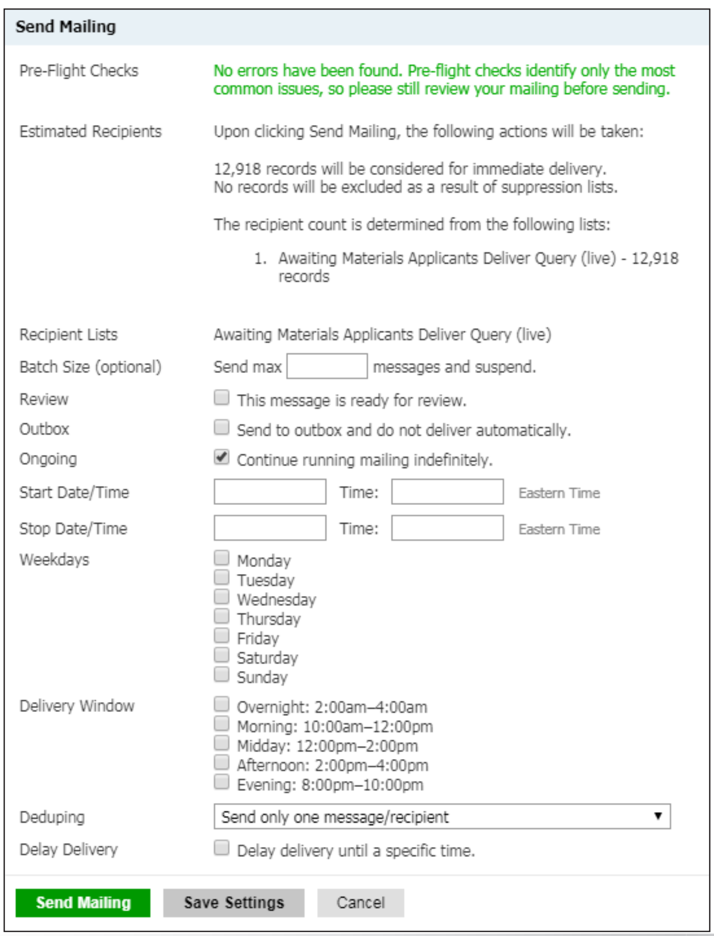
Now that you have selected your message audience, and have created message content, it is time to send the message/Email. Click the ‘Send Mailing’ button located near the top right of the screen. A dialog box will appear.



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: 12,918 records will be considered for immediate delivery. No records will be excluded as a result of suppression lists. The recipient count is determined from the following lists: 1. Awaiting Materials Applicants Deliver Query (live) - 12,918 records
Recipient Lists	Awaiting Materials Applicants Deliver 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 ☐ 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

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Errors will appear at the top of the dialog box next to Pre-Flight Checks. The number of recipients will appear next to Estimated Recipients. You can either set up the mailing to be ongoing (which will continue to send indefinitely when prospects/applicants meet the query filter criteria) or to only send out once. If you are wanting to only send out the message once, leave the 'Continue running mailing indefinitely' check box unchecked. If you are wanting the mailing to be ongoing, check the check box next to 'Continue running mailing indefinitely' and also check the appropriate boxes next to Weekdays and Delivery Window.

Note: There are three Deduping options:
- **Send only one message/recipient**: This option will make sure that recipients only receive the message once.
- **Do not dedupe messages**: This option will allow recipients to receive the message multiple times if they meet the filter criteria again in the future.
- **Allow recurring delivery of this message to the same recipient**: This will make ongoing messages send multiple email to the same recipient, day after day, until they no longer meet the specified query filter criteria. Best practice: Schedule delivery windos overnight from 2:00 am to 4:00 am.

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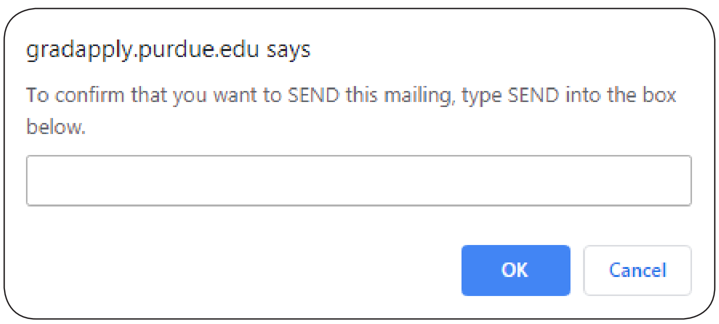
Once you have selected the appropriate message send options, click the 'Send Mailing' button near the bottom left of the dialog box. An additional pop-up will appear asking if you are sure you want to send the mailing. If you are sure, you will type SEND in the text box, and click the 'OK' button. Make sure you read the additional pop-up message text. In certain instances, you may be required to type in something other than SEND.



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You can stop the mailing at any time. You will now see a 'Stop Mailing' button instead of a 'Send Mailing' button on the right menu

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To locate your mailings in your folder, click the Deliver icon in the top navigation bar of Slate, and click into your folder in the right-hand navigation menu. You will see 3 message statuses: **Running/Ongoing**, **Completed** (these are messages that have been sent once), and **In Progress** (these are messages that have been started, but have never been sent).

Name	Method	Status ▲	Start Date	Updated
GS Applicants: Purdue Facilities/New Buildings - Day 18 Explore Purdue's Researc...	Email	Running/Ongoing	10/25/2019	03/29/2015
PMRI Application Attn Active Duty Service Members	Email	Running/Ongoing	12/04/2018	03/29/2015
GS Applicants: Community Info - 4 Days after Application Explore Greater Lafaye...	Email	Running/Ongoing	10/25/2019	03/29/2015
Winter Recess - Grad Offices Closed Grad Offices Closed for Winter Recess	Email	Completed	12/12/2019	12/11/2019
GS Applicants - Not Submitted/Not Paid 2 You can still apply to Purdue!	Email	Completed	11/07/2017	11/06/2017
GS Applicants - Not Submitted/Not Paid You can still apply to Purdue!	Email	In Progress		11/06/2017
Basic Template Change subject line	Email	Completed	03/02/2016	03/29/2015

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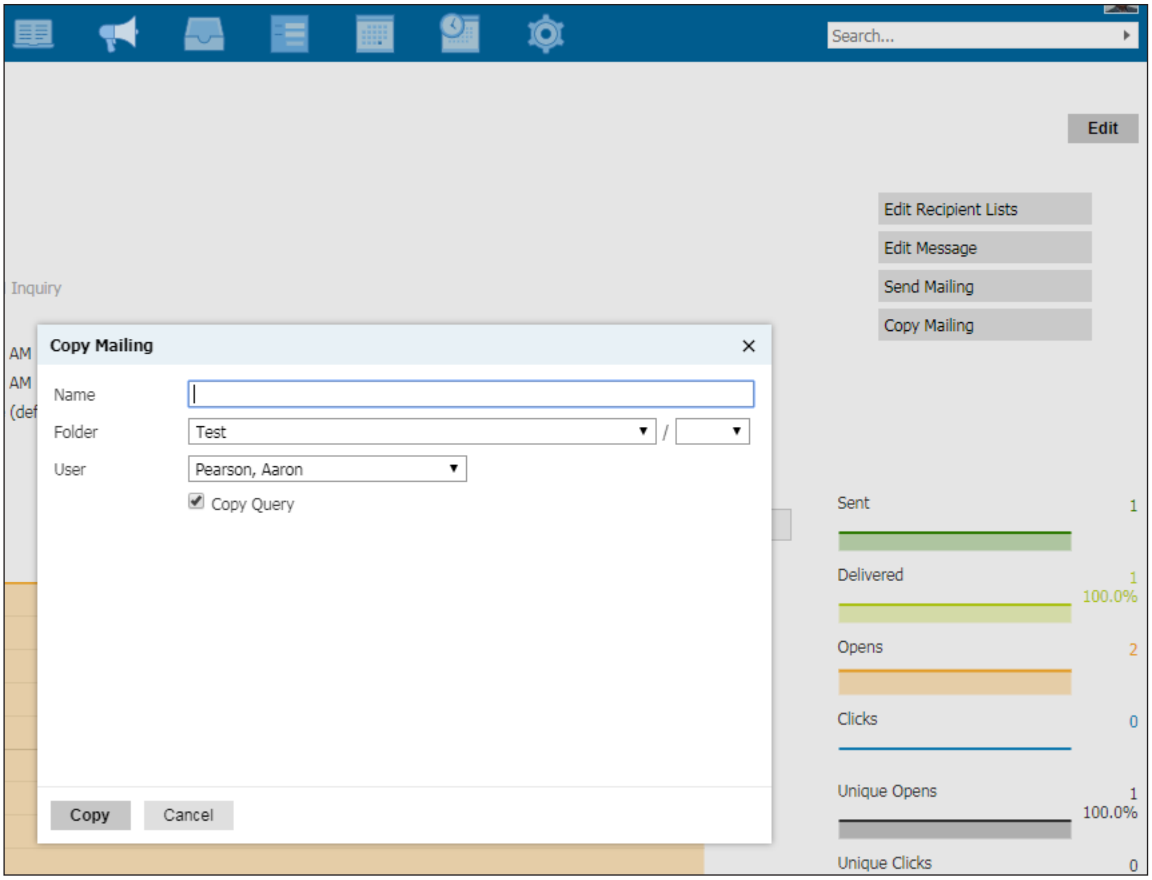
Aside from creating a new message, you can also copy a message. Simply click into a message, click the ‘Copy Mailing’ button, type in a name, select yourself as the User, and click the ‘Copy’ button.



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Once you click ‘Copy,’ you will be in the new message. You can edit the query and message the same as creating a new message. Note: When you copy a mailing, the name of the query that was associated with the old message does not change; however, you can update the name of the query to match the name of your new message by clicking into the query, and clicking the ‘Edit’ button at the top right of the screen.

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Deliver statistics are available within each message, and you can view messages sent through Deliver on the Timeline tab of the prospect/applicant record.

Filters with Start Date and End Date Options

(Do not use this filter if you are wanting the message to go out the same day as the status change.)

Start Date	End Date	When the applicant will receive the Slate Deliver Email
Today-2	today-1	1 day after status change (Tomorrow)
Today-3	today-2	2 days after status change
Today-4	today-3	3 days after status change
Today-5	today-4	4 days after status change
Today-6	today-5	5 days after status change
Today-7	today-6	6 days after status change
Today-8	today-7	7 days after status change (1 week)
Today-9	today-8	8 days after status change
Today-10	today-9	9 days after status change
Today-11	today-10	10 days after status change
Today-15	today-14	14 days after status change (2 weeks)
Today-22	today-21	21 days after status change (3 weeks)
Today-1month	Today-1month	1 month after status change
Today-36	today-35	35 days after status change (5 weeks)
Today-43	today-42	42 days after status change (6 weeks)
Today-50	today-49	49 days after status change (7 weeks)
Today-2months	Today-2months	2 months after status change
Today-1year	Today-1year	1 year after status change
Today-2years	Today-2years	2 years after status change

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