

# **Technolutions Slate Deliver Training Manual**



## **Office of Graduate Admissions**

**JoAnne Sandifur – Assistant Director**

**Aaron Pearson – Technical Specialist**

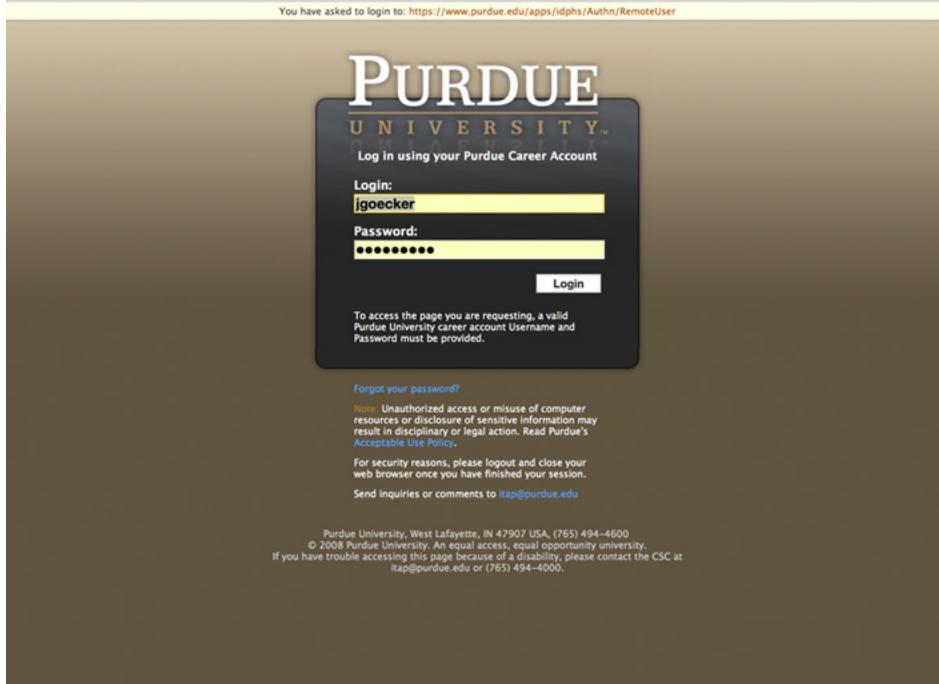
**[gradweb@purdue.edu](mailto:gradweb@purdue.edu) ~ x42600**

This document and other Slate resources are available at  
[www.purdue.edu/gradschool/admissions/internal](https://www.purdue.edu/gradschool/admissions/internal).

# Beginning

Login to the system with your PUID at: <https://gradapply.purdue.edu/manage>

- Be sure to login within the first few minutes you launch this site, otherwise you will be timed out and have to refresh your browser.
- Use Chrome, Firefox or Safari - *do not use any version of Internet Explorer*



Login Screen

Once logged into Slate, you should be greeted with the main homepage (pictured below)

A screenshot of the Slate Innovation Summit homepage. The top navigation bar is blue with the word "slate" in white. The main banner features a large graphic of the letters "Slate" in orange and blue, with the text "Slate Innovation Summit" and "June 17-19, 2015 · Hartford, Connecticut". Below the banner, a message says "The next registration deadline is this Friday, May 15. Register online today to join your Slate colleagues!". The page displays several social media posts from users like @technolutions, @PaulTurchan, @SulgLim, @RetiredScot21, and @larryburns. The footer includes links for "Technolutions Slate (Purdue University Graduate School)", "ORCLUS1", "Forums", "Service Desk", and "Slate TV".

Icons for system functions are located at the top of the main window.



## Sending a Message from a Student Record

- Navigate to the Lookup Records section (first icon from left)



- Select "Search database" from the drop-down menu
  - Here you can search for a contact by virtually anything
  - Most of your searches will be done by name, email, program of interest, etc.

A screenshot of the "Lookup Records" page in slate. The page has a blue header with the slate logo and various navigation icons. Below the header is a search bar with the placeholder text "Search for name, email, student ID". A red circle highlights this search input field. The page also features tabs for "Lookup" and "Applications (By Population)", a "New Person" button, and a "Filters" section with a dropdown menu and a search count of "72". At the bottom are links for "Technolutions Slate (Purdue University Graduate School)" and "ORCUS4 Forums Service Desk Slate TV".

Search for a contacts name here

- Click on desired student record

**\*Reminder:** Contacts are entered into the system a variety of different ways. The most common examples of this include: the "request information" link on the Graduate School's website (<https://gradapply.purdue.edu/register/info>), purchased lists (e.g. - GRE names), direct applicants (people that apply without requesting info first), manually entered from list gathered from graduate information fairs and recruiting events, and other types of manual entries.

- Navigate to Profile tab and send test message by clicking on email address

Goecker, Jeff-Test

Inquiry 001910532

Dashboard Interactions **Profile** Materials Inquiry

Biographic  
Jeff-Test Goecker  
Born 01/01/1990, age 25

Address

Contact

Email [jgoecker@purdue.edu](mailto:jgoecker@purdue.edu)

**Click here to send a message**

**Overview**

[Biographical](#)  
[Contact / Address](#)  
[Relationships](#)

[Schools](#)  
[Scores](#)  
[Jobs](#)

[Account](#)  
[Create Application](#)  
[Restore Application](#)  
[Edit Slate ID](#)  
[Display Audit Log](#)

- Once sent, this message will display in the Interactions tab
- All sent messages will display in this section
- It will also tell you if the contact has opened the message and/or clicked on any links

Goecker, Jeff-Test

Inquiry 001910532

Dashboard **Interactions** Profile Materials Inquiry

Date ▼	Code	Subject	User/Status
05/11/2015	Message	Autoreply-Inquiry form submission Thank you for your interest...	Sent/Opened
05/11/2015	Message	Autoreply-Inquiry form submission Thank you for your interest...	Sent/Opened
05/11/2015	Message	Testing from Slate - Student Record	Sent/Opened
04/10/2015	Message	Purdue University Graduate School Online Registration	Sent/Opened
03/18/2015	Message	Test #1 Get Social With The Purdue Graduate School	Sent/Opened
03/18/2015	Message	Test #1 Get Social With The Purdue Graduate School	Sent/Opened
03/18/2015	Message	Test #1 Get Social With The Purdue Graduate School	Sent/Opened
03/04/2015	Source	Test Export	Janet
03/04/2015	Source	Test Export	Janet
02/13/2015	Message	Trannert-Test Consider A Purdue MBA and Master's Degree	Sent/Clicked
02/13/2015	Message	Trannert-Test Consider A Purdue MBA and Master's Degree	Sent/Clicked
02/13/2015	Message	Test #1 Get Social With The Purdue Graduate School	Sent/Opened
02/12/2015	Message	Test #1 Get Social With The Purdue Graduate School	Skipped: Bad/...
02/11/2015	Source	Inquiry Tab	

Search Interactions...  
Messages  
Sources  
Interactions

# Deliver - Slate Automated and One-Off Messages for Multiple Contacts

- \* One-off message - type of message for specific purpose or event that only is sent once
- \* Automated messages - types of messages that are automatically queued and go out to contacts on a regular designated time

## Navigating to Deliver

Select the fourth icon from the left at the top (envelope) and click "Browse Mailings"



## Creating a new Email Message (Blank)

- Click the "New Mailing" button in the upper left under the Deliver heading
- This will bring up a pop-up menu

Min	Status	Start Date	Updated
System	System	05/12/2015	05/12/2015

• Name your email  
• Select the appropriate folder for your program (e.g. - WL Agronomy). Slate will save your message here.  
- Always leave the "Allow Unsubscribe" option for the Opt Out form  
• Click on the save button at the bottom of the pop-up box - This will generate a blank template for a new message.

# Creating A New Email Message (From A Template)

- Select your program from the list of links on the right side of the page

Jeffrey Goecker Logout

Deliver

New Mailing

Click here first

Browse Mailings

Start Date Updated

	Start Date	Updated
AY Emails	05/08/2015	
TOEFL Scholarships	05/08/2015	
GS Admitted	05/08/2015	
Dean's Congratulatory	05/08/2015	
WL Ingestive Behavior	05/08/2015	
WL Hospitality & Tourism	05/08/2015	
WL Counseling Psychology	05/08/2015	
WL Botany & Plant Pathology	05/08/2015	
WL Computational Life Sciences	05/08/2015	
WL Agronomy	05/08/2015	
Fee Satisfied - Submitted	In Progress	05/08/2015
Fee Satisfied - Not Submitted	In Progress	05/08/2015
Fee NOT Waived - Recruitment Program NOT Verified	In Progress	05/08/2015
Enrollment Form Not Submitted	In Progress	05/08/2015
E-mail Notice to Grad Office (Recruitment Program)	NOTIFICATION: Recruit...	05/08/2015
Deferment Letter	Your Purdue Graduate School Admission Deferment	05/08/2015
Decision Notification	Decision Available Online	05/08/2015
Decision Letter Not Viewed	Your Online Decision Letter	05/08/2015

Search Mailings...

Mailings

Calendar

Gateway Inbox

SMS Inbox

Select your folder here

Folders

- All Folders
- All Running
- All Ongoing-Active
- All Ongoing-Inactive
- .GS 1 Year
- AY Emails
- GS Admitted
- GS Applicants
- GS Autoreplies
- GS Expo Templates
- GS In Progress Applicants
- GS Junior
- GS Miscellaneous
- GS Multiple Audiences
- GS Senior
- GS Sophomore and Younger
- GS Unenrolled

- Find the email message you wish to copy from the list and click on the message (e.g. - "Responsive Template to Copy for Emails")

Deliver

New Mailing

Search Mailings...

Summary	Status	Start Date	Updated
Responsive Template to Copy for Emails Join our LinkedIn Group & Mingle	In Progress	05/11/2015	

*You will need to do this everytime you create a new message*

- Once the message opens, click the “Copy Mailing” button (right side menu)

**Responsive Template to Copy for Emails**

Method Email  
 Folder WL Agronomy  
 User [Jeffrey Goecker](#)

Recipient Lists  
 Current Status Not Running  
 Start Date/Time  
 Stop Date/Time  
 Opt Out Allow Unsubscribe (default)

**Message**

Reply To gradinfo@purdue.edu  
 Sender "Purdue University Graduate School" <gradinfo@purdue.edu>  
 Recipient {{Email}}  
 CC  
 Subject Join our LinkedIn Group & Mingle

**Edit**

**Edit Recipient Lists**

**Edit Message**

**Send Mailing**

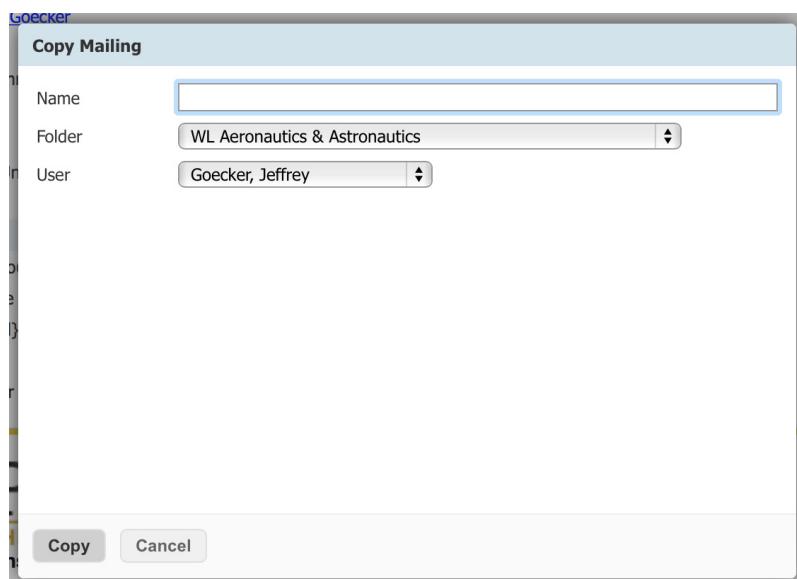
**Copy Mailing**

**Display Sample Message**

**Send Test Message**



- Rename your message
- Select desired folder (if different)
- Click the “Copy” button



# Editing a Message in Deliver

- Click on "Edit Message" Button on the right menu

Responsive Template to Copy for Emails Edit

Method	Email
Folder	WL Agronomy
User	<a href="#">Jeffrey Goecker</a>
Recipient Lists	
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	Allow Unsubscribe (default)

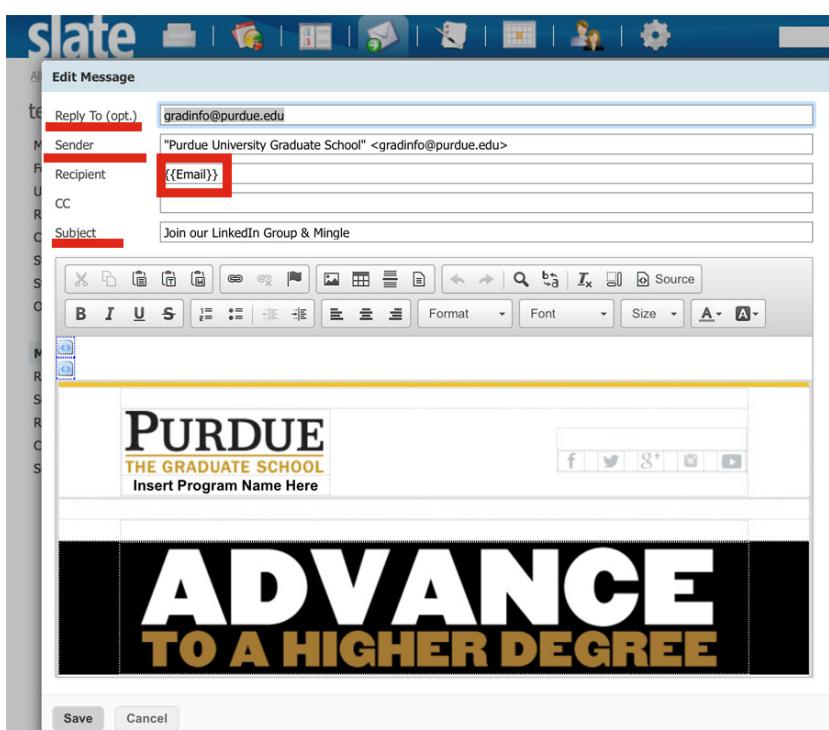
**Message**

Reply To	gradinfo@purdue.edu
Sender	"Purdue University Graduate School" <gradinfo@purdue.edu>
Recipient	{{{Email}}}
CC	
Subject	Join our LinkedIn Group & Mingle

Display Sample Message Send Test Message

*This will generate a pop-up window with your current message*



## Required fields:

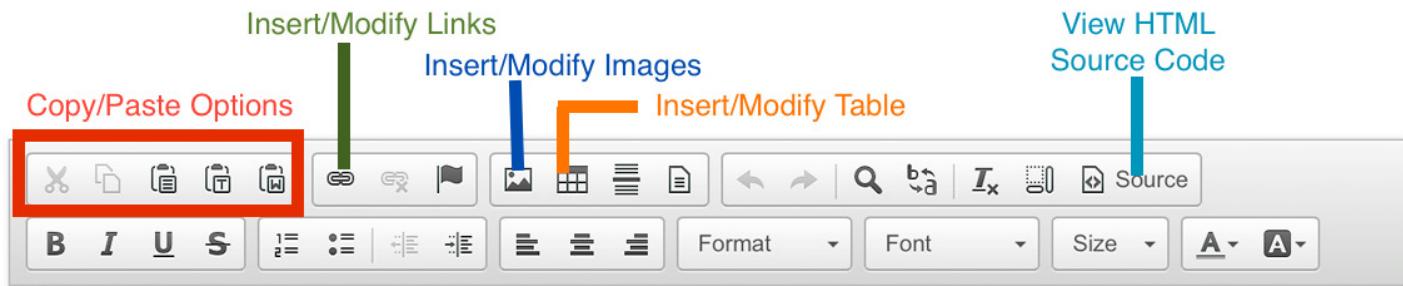
**Reply To (opt.):** This is the email address where you want the contact to reply to

**Sender:** Displays whom the email is coming from - Be specific here, limit to 24 characters - Recommended: Program Name (e.g., Purdue University Biological Sciences)

**Recipient:** Should be defaulted to {{{Email}}} - if not fill this in here exactly as shown

**Subject:** Subject lines for emails should briefly describe the email content - 30 characters will display on smartphones

## Formatting Toolbar



### Most used options:

- Copy/Paste (If pasting, use “paste as plain text” option. This will keep the original formatting.)
- Adding/Modifying Links
- Adding/Modifying Images
- Adding/Modifying Tables
- Text Formating
- Viewing Source Code

*If using the provided template, pay attention to:*

- Program name - under logo



- Social Media links - change these links to your program URL's. If you don't have one of these, leave default URL



- Image banner - feel free to swap out with another image (600 pixels max)



- More Info links: Change these to the most important pages on your site
- Contact info: Change to your programs specific information

- When done editing, click the "Save" button in the bottom left of pop-up window.

## Previewing a Message in Deliver

- Using the desktop and mobile icons (directly to the right - above the message display)
- "Display Sample Message" button on right side (Default view)
- "Send Test Message" button on right side
  - Send a message to yourself to preview in email client or mobile device

# Editing Recipients in Deliver

## Building a Query

- Click on the “Edit Recipients Lists” button on right menu
  - This will generate a pop-up window

Responsive Template to Copy for Emails Edit

Method	Email	<div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;">Edit Recipient Lists</div> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Edit Message</div> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Send Mailing</div> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Copy Mailing</div> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Display Sample Message</div> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Send Test Message</div>
Folder	WL Agronomy	
User	<a href="#">Jeffrey Goecker</a>	
Recipient Lists		
Current Status	Not Running	
Start Date/Time		
Stop Date/Time		
Opt Out	Allow Unsubscribe (default)	
<b>Message</b>		
Reply To	gradinfo@purdue.edu	
Sender	"Purdue University Graduate School" <gradinfo@purdue.edu>	
Recipient	{{Email}}	
CC		
Subject	Join our LinkedIn Group & Mingle	

- Select “Build Query” link (you may also upload a spreadsheet from here)
  - This will generate a refreshed pop-up window

Edit Recipient Lists

Name	Uploaded	Rows	Type
<a href="#">Build Query</a>			
<a href="#">Upload Spreadsheet</a>			

- Name your query
- Select:
  - Applications (By Population) - if the audience will be current or past applicants
  - Prospects - if the audience is unsolicited, inquirers, or other non-applicants
  - This will generate a refreshed pop-up window
- Merge tags (green boxes on next page) will configure export data

Build Query

Name	<input type="text" value="Insert a name here - e.g. - Submitted Applicants Fall 2016"/>
Type	<div style="border: 1px solid #ccc; padding: 5px; width: 300px;"><ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Prospects</li><li><input type="checkbox"/> Prospects (including opt-outs)</li><li><input type="checkbox"/> Applications (By Population)</li></ul><div style="margin-top: 10px; font-size: small; color: #f0f0f0;"><p>Prospects are unsolicited or inquirers Applications are applicants</p></div></div>

## Filters

The screenshot shows the 'Build Query' interface with the following details:

- Name:** Submitted Applicants - Fall 2016
- Type:** Applications (By Population)
- List Type:** Include
- Search Exports...** button
- Email Merge Tag must be present in order to send a message** (red warning message)
- Set Interaction** button
- Common Application Fields** section (highlighted with a green box):
  - Select All (checkbox)
  - App - Campus
  - App - Applicant Term/Year
  - App - Official PUID
  - App Submitted
  - App Created
  - App Updated
  - Application Status
  - Round
  - Round Key
  - Round Export
- Ref**, **Email**, **Preferred**, **First** fields (highlighted with yellow boxes)
- Last**, **Inquiry Program...**, **Entry Term/Year** fields
- Filters** section (highlighted with a red oval):
  - Add Filter dropdown
  - Arrange Filters button
  - =0 count
- Add filters by selecting from drop-down menu** (red text)
- Save**, **Delete**, **Cancel**, **Export** buttons

### Required filters to use:

- Person Status
- Inquiry Program of Interest (if prospect-based email)
- Unsolicited Program of Interest (if prospect-based email)
- PWL Applicant Program of Interest (if Applicant-based email)

### Recommended filters to use in most cases:

- Campus
- Entry Term/Year (if prospect-based email) [One-off messages mostly]
- Applicant Term/Year (if Applicant-based email)

### Other recommended filters to use:

- Years to Entry
- Years to Entry Change Date
- Application Status
- Application Status Change Date
- Decision (Applicants Only)
- Applicant/Inquiry Course Delivery
- Active Address
- Gender
- Race
- Hispanic-Latino

## Automated Filters - Based on Days

- Use **Change Date** filter and place "today-desired day" in the **End Date** field and day after in the **Start Date** field (see example below) - Slate uses recursive logic
- If using a **Change Date** filter for time based queries, **always** use the filter it is based on in conjunction with it (with the same selecton highlighted).

### Applicants:

- Use Application Status Change Date or similar  
e.g. - Message to unsubmitted applicants two weeks (14 days) in system - filter would be (SCREEN SHOT BELOW)

Application Status  Status  
Change Date

Awaiting Submission  
Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Confirmation

Start Date (optional)  
today-15

End Date (optional)  
today-14

Application Status  Status

Awaiting Submission  
Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Release

### Inquiry/Unsolicited:

- Use Status Change Date or similar  
e.g. - Message to inquirers two weeks in system - filter would be (SCREENSHOT BELOW)

Status Change Date  Status

Prospect  
Inquiry  
Applicant

Start Date (optional)  
today-15

End Date (optional)  
today-14

Person Status  Status

Applicant  
Inquiry  
Prospect

## Arranging Filters

- Click on “Arrange Filters” button (right of the filter drop-down menu)
  - Drag and drop interface
  - If you have exclusion filters, insert the NOT button by dragging down and place parentheses around filters to exclude

The screenshot shows a 'Filters' interface with a red box highlighting the top four filter boxes. A blue box highlights the green numerical value '=0' in the top right corner. A red box also highlights the bottom three filter boxes. The bottom section contains a message 'Drag and drop these to arrange'.

- Contacts will be displayed in the green numerical value (bottom right side)
  - This number is clickable and will display the contacts the message will be sent to based on your filter.
- When finished, click the “Save” button at the bottom

# Sending the Message

- Click “Send Mailing” button on right navigation
  - This will generate a pop-up window

Responsive Template to Copy for Emails Edit

Method	Email
Folder	WL Agronomy
User	<a href="#">Jeffrey Goecker</a>
Recipient Lists	
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	Allow Unsubscribe (default)

**Message**

Reply To	gradinfo@purdue.edu
Sender	"Purdue University Graduate School" <gradinfo@purdue.edu>
Recipient	{{{Email}}}
CC	
Subject	Join our LinkedIn Group & Mingle

**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:  
1 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. test (live) - 1 records Contact records from recipient lists are displayed here

Recipient Lists: test (live)  
Batch Size (optional): Send max  messages and suspend.  
Deduping:  Send only one message/recipient. Check this box (in almost all cases)  
 Continue running mailing indefinitely  
Ongoing:  Time:   
Start Date/Time:

Send Mailing Save Settings Cancel

Edit Recipient Lists Edit Message Send Mailing Copy Mailing

Display Sample Message Send Test Message

\* If Pre-flight Check OK, then it will read, “No errors have been found. Pre-flight checks identify only the most common issues, so please still review your mailing before sending.”

- The window will also tell you how many recipients will receive the message and which queries are being used.
- Check the Deduping box that states “Send only one message/recipient.” This will ensure that people do not receive more than one message.

## For One-Off Messages:

- Leave Ongoing checkbox blank
- Enter a desired send date and time

## For Automated Messages:

The screenshot shows the 'Send Mailing' dialog box. At the top, it says '1. test (live) - 1 records'. The form contains the following fields:

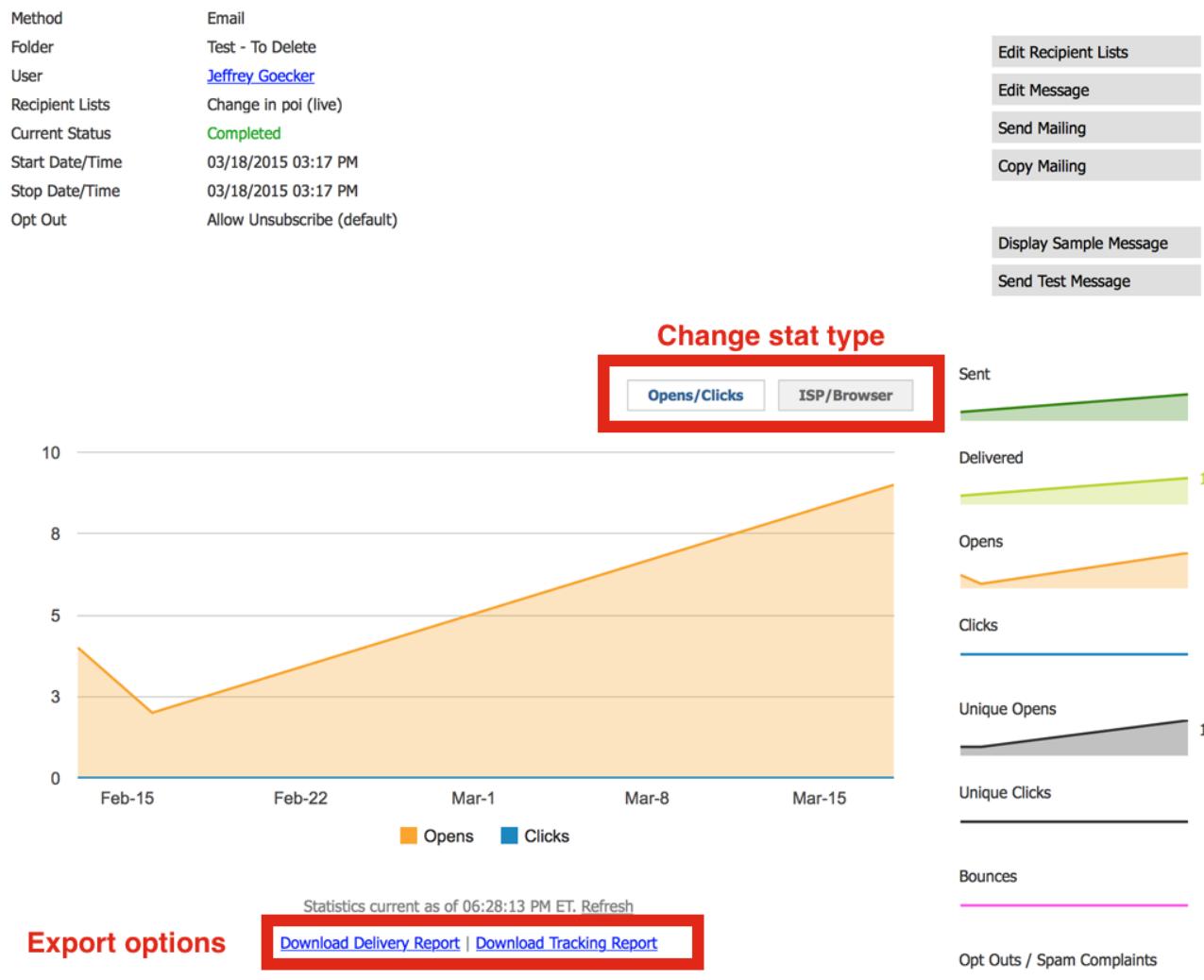
Recipient Lists	test (live)
Batch Size (optional)	Send max <input type="text"/> messages and suspend.
Deduping	<input checked="" type="checkbox"/> Send only one message/recipient.
Ongoing	<input checked="" type="checkbox"/> Continue running mailing indefinitely
Start Date/Time	<input type="text" value="05/14/2015"/> Time: <input type="text" value="1:00 PM"/>
Stop Date/Time	<input type="text" value="09/01/2016"/> Time: <input type="text" value="1:00 PM"/>
Weekdays	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday
Delivery Window	<input checked="" type="checkbox"/> Overnight: 2:00am–4:00am <input type="checkbox"/> Morning: 10:00am–12:00pm <input type="checkbox"/> Midday: 12:00pm–2:00pm <input type="checkbox"/> Afternoon: 2:00pm–4:00pm <input type="checkbox"/> Evening: 8:00pm–10:00pm
Recurring Delivery	<input type="checkbox"/> Deliver this message to the same recipient multiple times

At the bottom are three buttons: 'Send Mailing' (green), 'Save Settings' (gray), and 'Cancel' (gray).

- Check the Ongoing checkbox
- Enter a desired send date and time
- Enter a desired stop date and time (it should be September 1, 2016)\*
  - \*You will need to review your queued messages on an annual basis to keep the content up-to-date. Messages that are not checked annually may be removed from the system at a later date.
- Make sure that automated messages have all days of the week checked to prevent errors
- Select a Delivery Window (Generally it is a good idea to check overnight or morning).
- Leave Recurring Delivery checkbox blank
- When done, click the "Send Mailing" button

# Checking Results of Email Delivery

- Click on desired sent email message in folder
  - If sent, it will automatically display results section - you will see a start/stop date/time and graphical data



- Stats are shown on right side
- You can download a report for a detailed listing of all recipient data
- Pay attention to open and click rate
  - Benchmarking: Averages (2014) - Open rate: 23.5% Click: 3.5%
  - If your numbers are below these, you may want to adjust something in your message

## Additional Training Materials

The screenshot shows the Slate platform interface. At the top, there's a navigation bar with icons for file management, applications, and user profile. A banner at the top right says "Jeffrey Goecker Logout". Below the banner, it says "Welcome, Jeffrey." and "You have accessed Slate from 1 computer in the past 72 hours. [Details](#) [Supervised Login](#)". The main content area features a large image of a stage with the text "The 2015 Slate Innovation Summit" and "June 18-19, 2015 · Hartford, Connecticut". Below this, it says "The next registration deadline is TODAY: Friday, May 15. Register online today to join your Slate colleagues!". To the left, there's a video player for the "Slate Innovation Summit 2014 Presentation" (June 26–27, 2014) on YouTube. Below the video player, there are five tweet cards from Technolutions staff:

- @technolutions** Today is the final day for discounted registration for the Slate Innovation Summit! Register via Slate! #SlateSummit (Posted 1 hour ago)
- @DomenickRozzi** @jdekzoo @technolutions @KzooAdmission Welcome aboard KZoo. You've made a great decision! (Posted on 13 May)
- @jdekzoo** So excited for our @technolutions kick-off call today! @KzooAdmission is moving to Slate! #crm #efficiency #worksmarter (Posted on 12 May)
- @technolutions** URLs in the student record and Slate Reader now dynamically update when switching tabs or students, enabling you to share targeted links. (Posted on 11 May)
- @PaulTurchan** @technolutions latest feature, live service desk help. #CAEngage15 @timdunning (Posted on 08 May)
- @SulgiLim** @technolutions Slate is great! #CAEngage15 (Posted on 08 May)

At the bottom left, it says "Technolutions Slate (Purdue University Graduate School)". On the right, there are links for "ORCUS3", "Forums", "Service Desk", and "Slate TV", with "Forums" and "Slate TV" circled in red.

Use the Forums and Slate TV links to learn more. Search for Deliver.

### Questions?

Please send to Jeff Goecker - [jgoecker@purdue.edu](mailto:jgoecker@purdue.edu)

# Appendix I

## Examples of Queries Including Filters for Email Messages

Filters

Add Filter  Arrange Filters NOT ( OR ) =0

Person Status IN Applicant Inquiry Program of Interest IN Agronomy Campus IN West Lafayette (Main Cam...)

Application Status IN Awaiting Submission Application Status Change Date IN today-15, today-14

Save Delete Cancel Export

(Above) This is an example of an automated message for applicants to Agronomy that have started their application. It is set to go out 2 weeks after they start their application.

Filters

Add Filter  Arrange Filters NOT ( OR ) =0

Person Status IN Inquiry Years to Entry Change Date IN 1 Year, today-56, today-55 NOT (

Inquiry Course Delivery IN Distance (online or off-ca... Inquiry Program of Interest IN Interdisciplinary Enqineeri... )

Save Delete Cancel Export

(Above) This is an example of an automated message for inquirers sent 8 weeks after being in the system. This excludes those that have inquired about the IDE online program.

## Appendix II

### Specific Examples of Queries for Various Types of Email Messages

To automatically send to all inquirers interested in your program (below):

Filters

Add Filter

Person Status IN =0

Person Status IN

Applicant  
Inquiry  
Prospect

Inquiry Program of Interest IN

Adult Gerontology Primary Care Nurse Practitioner (Certificate)  
Aeronautics and Astronautics  
Agricultural and Biological Engineering  
Agricultural Economics  
Agronomy  
American Studies - Interdisciplinary  
Animal Sciences  
Anthropology  
Applied Heat Transfer (Certificate)  
Applied Statistics (Certificate)

Change to your program

Status Change Date IN Status

Prospect  
Inquiry  
Applicant

Start Date (optional) Select timeframe for auto-delivered messages (here it will be on day 7)  
today-8

End Date (optional)  
today-7

Save Delete Cancel Export

The screenshot shows a software interface for filtering data. At the top, there's a 'Filters' section with an 'Add Filter' button, a dropdown menu set to 'IN', and a green '=0' indicator. Below this are three filter sections: 'Person Status' (set to 'IN'), 'Inquiry Program of Interest' (set to 'IN'), and 'Status Change Date' (set to 'IN'). The 'Inquiry Program of Interest' section lists various academic programs and certificates. The 'Status Change Date' section includes dropdown menus for 'Start Date (optional)' and 'End Date (optional)', both currently set to 'today-8'. At the bottom are standard buttons for 'Save', 'Delete', 'Cancel', and 'Export'.

To auto send to a subset of inquirers depending on how far out they are from their entry term of interest. For example, inquirers 1 year out from applying (below):

Filters  =0

Person Status IN Applicant Inquiry Prospect

Inquiry Program of Interest IN Adult Gerontology Primary Care Nurse Practitioner (Certificate) Aeronautics and Astronautics Agricultural and Biological Engineering Agricultural Economics Agronomy American Studies - Interdisciplinary Animal Sciences Anthropology Applied Heat Transfer (Certificate) Applied Statistics (Certificate)

Years to Entry IN 1 Year 2 Years 3+ Years

Years to Entry Change Date IN years\_entry 1 Year 2 Years 3+ Years **This message would be send to Senior-level Inquirers on day 7. For Junior-level , you would select "2 years"**

Start Date (optional)  
today-8

End Date (optional)  
today-7

To auto send to prospects aka unsolicited students once they have been an inquirer for 1 week (below):

Filters

Add Filter  Arrange Filters =0

Person Status

Applicant  
Inquiry  
Prospect

Inquiry Program of Interest

Adult Gerontology Primary Care Nurse Practitioner (Certificate)  
Aeronautics and Astronautics  
Agricultural and Biological Engineering  
Agricultural Economics  
Agronomy  
American Studies - Interdisciplinary  
Animal Sciences  
Anthropology  
Applied Heat Transfer (Certificate)  
Applied Statistics (Certificate)

Years to Entry

1 Year  
2 Years  
3+ Years

Same as previous message, but this one is for Unsolicited Seniors

Years to Entry Change Date   years\_entry

1 Year  
2 Years  
3+ Years

Start Date (optional)  
today-8

End Date (optional)  
today-7

To send to Fall 2016 Inquires - One off/One Time Send (below):

**Filters**

Add Filter   =0

Person Status  IN   
Applicant  
Inquiry  
Prospect

Inquiry Program of Interest  IN   
Adult Gerontology Primary Care Nurse Practitioner (Certificate)  
Aeronautics and Astronautics  
Agricultural and Biological Engineering  
Agricultural Economics  
Agronomy  
American Studies - Interdisciplinary  
Animal Sciences  
Anthropology  
Applied Heat Transfer (Certificate)  
Applied Statistics (Certificate)

Entry Term/Year  IN   
Fall 2015  
Fall 2016  
Fall 2017  
Fall 2018  
Spring 2015  
Spring 2016  
Spring 2017  
Spring 2018  
Summer 2015  
Summer 2016

To auto send to your in-progress applicants (below):

Filters

Add Filter  Arrange Filters =0

Person Status IN  Applicant  
Inquiry  
Prospect

PWL Applicant Program of Interest IN  Aeronautics and Astronautics  
Agricultural and Biological Engineering  
Agricultural Economics  
Agronomy  
American Studies  
Animal Sciences  
Anthropology  
Aviation Technology  
Basic Medical Sciences  
Biochemistry

Campus IN  Fort Wayne (IPFW)  
Hammond (Calumet Campus)  
Indianapolis (IUPUI)  
West Lafayette (Main Campus)  
Westville (North Central Campus)

Application Status Change Date

Application Status IN  Status  Awaiting Submission  
Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Release  
Start Date (optional)  
today-15  
End Date (optional)  
today-14

For applicants that have not submitted - sent on day 14

Awaiting Submission  
Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Release

Save Delete Cancel Export

The screenshot shows a 'Filters' section with various dropdown menus and checkboxes. The 'Application Status' field is circled in red. A red box surrounds the dropdown menu for 'Application Status', which lists 'Awaiting Submission', 'Awaiting Payment', 'Awaiting Materials', 'Awaiting Decision', and 'Awaiting Release'. A red text annotation 'For applicants that have not submitted - sent on day 14' is positioned next to this menu. At the bottom, there are 'Save', 'Delete', 'Cancel', and 'Export' buttons.

To auto send to your in-progress applicants (below):

Application Status  Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Release  
Decision Released

Application Status Change Date  Status Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Release  
Decision Released

Start Date (optional) today-15

End Date (optional) today-14

**Change these fields - depending on what audience of applicants.  
Here, these are submitted applicants awaiting a decision.**

To auto send to your admitted applicants (below):

Application Status  Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Release  
Decision Released

Application Status Change Date  Status Awaiting Payment  
Awaiting Materials  
Awaiting Decision  
Awaiting Release  
Decision Released

Start Date (optional) today-15

End Date (optional) today-14

**Modify the previous query to Decision Released &  
add a filter for Decision (first) = Admitted**

Decision (First)  Admitted  
Deferred Admission  
Denied  
Enrollment Accepted  
Enrollment Declined

**Save Delete Cancel Export**

To send manually to your Fall 2016 admitted applicants (below):

Filters

Add Filter  Arrange Filters =0

Person Status IN  Applicant  
Inquiry  
Prospect

PWL Applicant Program of Interest IN  Aeronautics and Astronautics  
Agricultural and Biological Engineering  
Agricultural Economics  
Agronomy  
American Studies  
Animal Sciences  
Anthropology  
Aviation Technology  
Basic Medical Sciences  
Biochemistry

Decision (First) IN  Admitted  
Deferred Admission  
Denied  
Enrollment Accepted  
Enrollment Declined

Campus IN  Fort Wayne (IPFW)  
Hammond (Calumet Campus)  
Indianapolis (IUPUI)  
West Lafayette (Main Campus)  
Westville (North Central Campus)

Applicant Term/Year IN  Fall 2015  
**Fall 2016**  
Fall 2017  
Fall 2018  
Spring 2015  
Spring 2016  
Spring 2017  
Spring 2018  
Summer 2015  
Summer 2016