Tipsheet: Sending Out Mass Emails in ApplyYourself

In ApplyYourself (AY), it is very simple and easy to send a mass email to all of your prospects, applicants, or students with applications in-progress. All that is involved is setting up the email template and then running a query to pull all of the applicable recipients of your email.

Step 1: Getting Started

Thinking through these steps below will make it easier for you to create your email template.

- What is your target audience? Do you want to notify prospects of interesting events in your department? Do you want to let students who have already submitted their applications that they have materials that they still need to submit? Do you want to notify students who have started, but not yet submitted, their applications of your upcoming deadline? These are important questions to consider, because they will determine which part of AY you will need to access, as well as what type of query you will need to run.

- What term or date range do you want to pull students from? It is important to make sure that you’re not sending your email to students to whom it will no longer be pertinent.

- Create your template in HTML or text format? If you’re in a hurry, or if you don’t have a lot of HTML experience, then text format is your best bet. AY does provide some help for the HTML neophyte (see Step 3 below), though the scope is limited. The downside of text, is that you cannot include anything like bullet points, bold or italic text, or pictures to enhance your message.

- Do you want to include your logo in the message? If you do, as mentioned above, you will have to create your template in HTML format. Also, you will need to make arrangements with the Graduate School to have your logo uploaded to the AY server. Remember, if you do include a logo or pictures, please keep the size down to avoid any problems with your message being refused by the receiver.

- Did you know that you’re required by law to have an unsubscribe option when you send out mass emails? AY provides hyperlink text for you to put in each of your email templates to allow for this.
Step 2: Logging into ApplyYourself

Navigate to:
https://webcenter.applyyourself.com

After entering your Client ID, User Id, and password, you will arrive at the main page.

Your Target Audience
If your target audience is applicants or applicants-in-progress, you will access AY’s application module.

If your target is prospects, i.e. those who have indicated an interest in your program but who have not accessed the online application, you will access AY’s prospect module.

This is the only manner in which emailing prospects differs from emailing applicants. All subsequent steps can be assumed to refer to both prospects and applicants, unless otherwise noted.
Step 3: Creating Your Template

Select **Webcenter Administration > Manage Templates > Manage Email Templates**

You will see a list of all existing email templates.

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Data. The i-Class Application Module provides the stability, flexibility and strength you need to turn your Web site into an admissions management and access the entire process on the Web.

Dynamic data to applicants

Sent applicants using your program’s

application is ready to database and complete your applicants

Create an unlimited number of export templates for downloading data
At the top right of the screen, click the **Add** button. You will see an empty template screen.

<table>
<thead>
<tr>
<th>Application Module :: Add Email Template</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>show</strong></td>
</tr>
</tbody>
</table>

- **Template Name**: 
- **Description**: 
- **Lock**: 
- **Email Sender**: 
- **Email From Field**: 
- **To**:  
  - Applicant's Profile Email Address 
  - Other Email Address 
- **Email Reply To**: 
- **BCC All**: 
- **BCC Notification**: 
- **Subject**: 
- **Message**: 

**Message Type**:  
- **Text**  
- **preview**  
- **spam check**  

**Folder**:  
- **Select**  

**Mail Merge Section**:  
- **Select**  

**Mail Merge Tag**:  
- **Select**  

*Be sure to copy the entire mail merge tag from the box above as the text may "wrap" onto multiple lines*
Template Fields

- **Template Name:** Enter a short, descriptive name, so that you can determine the content of the email from the list of templates you see when you select “Manage Email Templates.”

- **Description:** Flesh out the Template Name with more details, if you wish.

- **Lock:** DO NOT LOCK templates. No one in your department will be able to use this template if you are out or depart from the university.

- **Email Sender:** This is the name (NOT the email address) that your email will be listed as “From” in the recipient’s mailbox. Consider a descriptive name, i.e. Graduate School of Arts & Sciences, or Center for Latin American Studies.

- **Email From Field:** The email address associated with your department, i.e. “gradmail@georgetown.edu.”

- **To:** The default is *Applicant’s Profile Email Address* in the application module, and *Prospect’s Email Address* in the prospect module. These both reflect the initial email address entered by the student. You will want to use this option.

- **Email Reply To:** This is the email address that will be placed in the “To” field when the student clicks “Reply” to respond to your message. It automatically defaults to the same address as the *Email From Field*, but you can change it to an alternate address if you would prefer that inquiries go to a specific person, for example.

- **BCC All** and **BCC Notification:** These fields serve as ways of notifying you that your email message has been sent. If you want to use this feature, it advisable for you to use **ONLY** the BCC Notification field. The *BCC Notification* field sends you a blind carbon copy of the last message, whereas the *BCC All* field sends you a blind carbon copy of each message.

- **Subject:** Choose a subject line that will be interesting to your applicants or prospects. Click the *Spam Check* button to determine the likelihood of your message being caught by a spam filter.

- **Message and Message Type:** The body of your message. See Section 4 below for more information.

- **Folder:** Save all messages in the folder for your department.

- **Mail Merge Section** and **Mail Merge Tag:** These are the fields by which you set up your template to retrieve data from AY to personalize your message for each student. See Section 4 below for more information.
Step 4: Entering Your Message

After you have entered the information described in Section 3, it is time to proceed to the most important part – the body of your message.

Message Type
As mentioned above, you will have to decide whether you want to have your message in text or HTML format. Each has its pros and cons; however, if you are able, HTML will give you more flexibility in formatting your message.

- Before you begin with your message, go to the Message Type field and select the format (text or HTML). Enter your message text as you normally would in an email browser, including any HTML formatting you need.

- If you choose HTML, you will see the links below to email, event, and newsletter templates below the message entry box.

  HTML Email Templates: 1 | 2 | 3
  Newsletter Templates: 1 | 2

  Event Invitation Templates: 1 | 2
  HTML formatting help

  Preview
  Spam check

  These templates have been set up by AY. The top of the window is the HTML code; the bottom of the window is a mock message.

  If you like any of the templates, copy the code into the message block of your template. Please take care to make all changes listed at the top of the mock AY template. Please also keep in mind that any graphics or logos must be uploaded to the AY server before your message is sent.

  There is also a link for HTML formatting help, which provides basic coding help for those unfamiliar with HTML.
Personalizing Your Message
AY allows you to pull in information from the applicant’s (or prospect’s) record, such as name, address, program, and admit term, so that you can personalize each email for each respective student. It is not necessary, of course, to do this. It is easy to include this in your message, and it will have a greater effect on the students who read your email.

AY provides mail merge tags to pull in the information from each record. At the bottom of the screen you will see these fields.

- Select the appropriate Mail Merge Section, then select the information specific to the applicant that you want to include in the email.

  - For example, you want to send out a message every month thanking people who recently applied to your program, regardless of whether they’ve applied for the Fall term or the Spring term. You’ve written your message, and now you need to add your mail merge tags:

    Subject*: You’ve applied to Georgetown Basketball
    Message*: Dear
    Thank you for applying to the Master’s in Basketball program for the Fall term! We’re looking forward to reviewing your application.

  - First, you want to include the applicant’s name in the message. Go to the Mail Merge Section drop-box and select “Personal Information.” Go to the Mail Merge Tag drop-box and select “Applicant First Name.” [Note: All mail merge tag names are usually slightly different in the Prospect Module. There are also fewer tags.] You will see an HTML sequence populated in the Mail Merge Tag box. Copy this entire tag and paste into your message beside “Dear”.

    Mail Merge Section: Personal Information
    Mail Merge Tag: <ay:tag type="MM" id="54205" name="Applicant First Name"/>

Be sure to copy the entire mail merge tag from the box above as the text may "wrap" onto multiple lines.
Next, you want the applicant’s admit term. Go to the **Mail Merge Section** drop-box and select “Graduate Program Information.” Go to the **Mail Merge Tag** drop-box and select “Intended Entry Term 1.” Again, copy this entire tag and paste into your message.

**Reminder about AY and Admit (Entry) Terms:** Because of the way that the AY and their queries are set up, if you choose to include admit terms in your emails you will have to set up two versions of your email. An applicant has the option of choosing your program in one of two drop-boxes on the application. To send this email to all of your applicants you will need to have an email for each drop-box in the application, as well as a query for said drop-boxes. While this sounds complicated, once your query is set up you can reuse it each time you want to send a new message. You’ll only need to modify the date.

**Unsubscribe Option**
You must include an option for recipients to opt out of receiving any further emails from you, as required by law. This is done through a mail merge tag that, when clicked on by the student, takes them to a window in AY that asks them to confirm their wish to unsubscribe.

- Think of a sentence providing the option to subscribe, i.e. “Click here if you no longer wish to receive emails from The Georgetown University Graduate School of Arts & Sciences.”
- To retrieve the mail merge tag, go to the **Mail Merge Section** drop-box and select **System Fields**. Go to the **Mail Merge Tag** box and select **Email Subscription Link**.

Select the tag that appears in the box below. The tag is very long, so make sure that you scroll through the whole box and select the entire tag.

- This tag is the “Click here” in the sentence above. Type your sentence into your email, pasting the mail merge tag in the appropriate spot.
- You do have to modify the tag. If you will notice, at the end of the tag it says, “Type your text here.” Delete this text and change it to “Click here,” etc.
This is what your completed email message now looks like. You’re almost ready to send it.

Subject*: You’ve applied to Georgetown Basketball

Message*: Dear <ay:tag type="MM" id="54205" name="Applicant First Name"/>,

Thank you for applying to the Master’s in Basketball program for the <ay:tag type="MM" id="54253" name="Intended Entry Term 1"/> term. We’re looking forward to reviewing your application.

<a href="http://email.applyyourself.com/?id=gtu-g&pd=554&appid=<ay:tag type="MM" id="applicantClientId" name="Applicant ID"/&email=<ay:tag type="MM" id="ApplicantEmail" name="Applicant Email"/">Click here</a> if you no longer wish to receive emails from The Georgetown University Graduate School of Arts &

Preview Your Message

Click the Preview button (beside the Message Type drop-box) to see what your message will look like to the recipients. This is more important when the format of your email is in HTML, as it will allow you to check your coding and spacing.
Step 5: Sending Your Message

In order to send your message, you must run a query to pull a list of all of the students that meet your criteria.

Running Your Query

- In AY, go to WebCenter Administration and then select Manage Queries. Click on the folder for your department.

- In the Application Module, you already have two queries set up to give you a listing of applicants who have chosen your department in the first selection box and in the second selection box of the online application.
  
  - Click on the query you wish to run. (If you are in the Prospect Module, you may have to create a new query. Please see the tipsheet on creating queries in AY if you need further assistance.)
  
  - If you would prefer you can create a new query for students from a specific date range.

- At the top of the screen, select Application Submitted or Application In Progress.

  Query Name: Linguistics Applications 1
  
  - Application Submitted will retrieve students who have already submitted their applications.
  
  - Application In Progress will retrieve those who have begun, but not completed, their applications.

  Note: The above does not apply in the Prospect Module.
Test Your Message
You should also test your message, to make sure that the format is correct. Testing will point out any HTML errors also, if you choose this format for your message. You or someone in your department can set up a dummy application (without submitting!) or prospect record. Search for that particular person, and then send only to them (see below).

Preparing to Send
After you have run your query, you will see a search results page. Scroll to the bottom of the page to the Select an Action box.

Selecting Template Parameters
The next screen you see very similar to the screen in which you developed your email template. Go to Select a Template at the top of the screen and choose your template from the list. Templates are sorted by folder.

Record in Action History
The Action History is a list of actions that have been taken in regard to each application. It is a good idea to leave this box checked, so that you can keep track of who has received what emails from you. The action label will default to the subject line of your email.
Avoid Duplicates

- You can avoid students receiving duplicate copies of your email by checking the box beside “Do not send email to applicants that have already received this message.”

  *Note:* This function only works properly if you always record sending of emails in the applicants’ Action History.

- In the Prospect Module, avoid duplicates by selecting the checkbox similar to the one mentioned above in the Application Module. Check the box by “Exclude all prospects matched to online applicants from distribution.”

Scheduling a Specific Time

At the bottom of this screen, you will notice that you can schedule your message to go out at a specific time of day. If you are sending your message out to a large quantity of people, e.g. 500 or more, it is advisable to send your message out in the middle of the night. This eases the load on the AY servers, causing less likelihood of problems with your message going out.

<table>
<thead>
<tr>
<th>Send Now or Schedule for Later</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail Batch Name*: Email Batch sent on 6/19/2007 1:30:06 PM</td>
</tr>
<tr>
<td>Mail Batch Description:</td>
</tr>
<tr>
<td>Mail Now:</td>
</tr>
<tr>
<td>Time to be Mailed: [Select]</td>
</tr>
<tr>
<td>Date to be Mailed:</td>
</tr>
</tbody>
</table>

- Select the hour and time to be mailed. Click on the calendar icon to select the date.

- **Important!** If you are scheduling your email to go out early in the morning, make sure you select tomorrow’s date and not today’s date! If you select today’s date, you are backdating and your email won’t go out.

Sending the Message

Now that you’ve selected all of your parameters for your email, you are now ready to send it. Simply click the **Send** button located at the top or bottom of your screen.