

Top 10 Tips for Deliver Organization

Deliver 101

Tuesday, May 10, 2022



+ today's agenda

1. Introductions
2. Top 10 Deliver Tips
3. Questions + Answers

1

Let's ~~Not~~ Put a Label On It

Folders

CARNEGIE

Underscore

[Anti-Melt](#)

[App Gen](#)

[Junior Search](#)

[Nursing](#)

[School Counselor](#)

[Senior Search](#)

[Sophomore Search](#)

[Yield](#)

Folders

[All Folders](#)

[2021 Events](#)

[2021 Senior Search](#)

2022 Events

[Accepts](#)

[Athletics](#)

[Campus Visits](#)

[INTL](#)

[Open House](#)

[Showcase](#)

[Transfer](#)

[2022 INTL](#)

[2022 Senior Search](#)

[2022 Transfer](#)

[2023 Senior Search](#)

Populations



Rules

Rules provides self-service management of automations

New Rule

Name

Underscore_Senior Search 2022	→	Senior Search_Underscore
Underscore_Yield 2022	→	Yield_Underscore
Underscore Anti-Melt 2022	→	Anti-Melt_Underscore

Deliver Mailings

CARNEGIE

Deliver

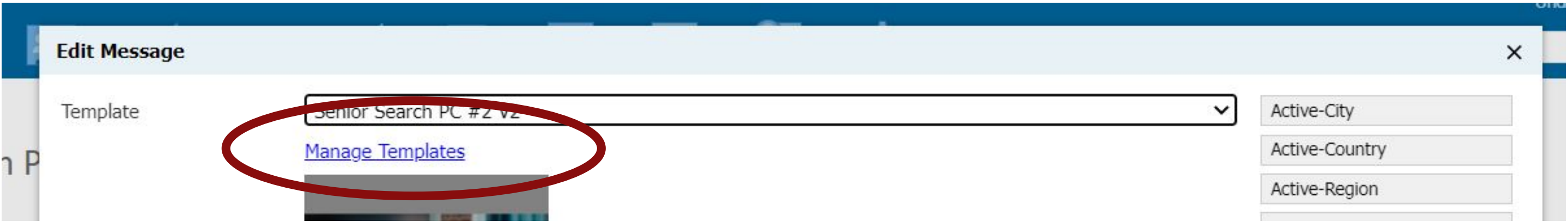
New Mailing



Name ▲	Method	Status	Start Date	Updated
#01 Yield SMS	SMS	Completed	04/18/2022	04/18/2022
#01 Yield [REDACTED]	Email	Running/Ongoing	04/13/2022	04/13/2022
#02 Yield Here are your next steps, {{Preferred}}	Email	Running/Ongoing	04/13/2022	04/13/2022
#02 Yield SMS	SMS	Completed	04/24/2022	04/24/2022
#03 Yield Our financial aid office is working on your financial aid package	Email	Running/Ongoing	03/11/2022	03/10/2022
#03 Yield SMS	SMS	In Progress		04/25/2022
#04 Yield [REDACTED] Let's connect, {{Preferred}}	Email	Running/Ongoing	03/29/2022	03/29/2022
#05 Yield [REDACTED]	Email	Running/Ongoing	04/04/2022	04/04/2022
#05A (Opener) Yield Our academic community welcomes you!	Email	Running/Ongoing	04/08/2022	04/08/2022
#06 Yield [REDACTED]	Email	Running/Ongoing	04/12/2022	04/11/2022
#07 Yield [REDACTED]	Email	Running/Ongoing	04/17/2022	04/13/2022
#08 Yield (Commuter) [REDACTED]	Email	Running/Ongoing	04/21/2022	04/21/2022
#08 Yield (First Gen) [REDACTED]	Email	Running/Ongoing	04/21/2022	04/21/2022
#08 Yield (International) [REDACTED]	Email	Running/Ongoing	04/21/2022	04/21/2022
#08 Yield (Residential) [REDACTED]	Email	Running/Ongoing	04/21/2022	04/21/2022
#09 Yield You're invited, {{Preferred}}!	Email	In Progress		04/19/2022
#10 Yield Put yourself first, {{Preferred}}	Email	In Progress		04/19/2022

2

Deliver Foundational Toolkit #1



slate

Account

New

Existing

Data

Support

News

Home / New

Select Project Format & Size

Please select the format & size of your project below.

Postcard 4.25" x 6"

Mailer 5.5" x 8.5"

Mailer 6" x 9"

Mailer 6" x 11"

Select Mailing Options

Product:

Mailer 6" x 9"

Size (Flat/Folded)

6" X 9" / 6" X 9"

Paper / Material:

120# Dull Cover

UV Coat:

Yes

Production:

Digital

Production Days:

4

Production Price By Minimum Quantity

1	200	500	1,000	2,500	5,000	10,000	15,000	20,000+
0.90	0.90	0.90	0.52	0.29	0.22	0.18	0.17	0.17

Postage Price By Mailing Type

Single Piece	Standard Presort (min 200)	Nonprofit Presort (min 200)	First-Class Presort (min 500)
0.58	0.33	0.20	0.33

Single piece postage price will be used for all mailings unless the required quantity of records are sent for the selected mailing option. Record requirements are calculated by the total number of recipients for a given template on a given day. Mailings with less than 200 recipients will be stamped. "Nonprofit" and "Standard Presort" mailings have a minimum requirement of 200 records. "First-Class Presort" mailings have a minimum requirement of 500 records.

Please select the mailing options for your print project below.

Configurations

- [Slate Template Library](#)
- [Briefcase Import](#)
- [Files](#)
- [Configuration Keys](#)
- [Slate Payments Deposit Accounts](#)
- [Person-Scoped Payment Configuration](#)
- [Research Configurations](#)
- [Slate.org Application Sharing Settings](#)
- [Your Year in Review](#)

Database Configuration

Setting

- HTTP Subdomain
- HTTPS Subdomain
- Admissions License
- Advancement License
- Service Desk Support License
- FTP Folder Override
- [Early Access Features](#)
- Register URL

Edit Early Access Features

Early Access Features

- ☒ Active Scheduler
- ☒ Configurable Joins in Forms/Events
- ☒ Default to Configurable Joins Query Base
- ☒ Research
- ☒ Retention Policy Scheduler
- ☒ Slate Video
- ☒ Slate Voice

New Mailing

Name

Slate Voice Demo

Folder

Testing

User

Porcella, Nick

Method

Voice

Hide from Timeline

☐

Edit Message

Sender

Master Number (+1

Recipient



Connect

SMS

Slate Voice

Tel

Close

Video

CARNEGIE

✕

Edit Message

Sender

"Underscore" <info@underscorehighered.com>

Reply To

Recipient

CC

Subject

Version 1 ▾

Preheader ⓘ

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Format ▾

Font ▾

Size ▾

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Save

Cancel

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3

Deliver Foundational Toolkit #2

Configuration

Messages

[Deliver Configuration](#)

[DKIM Configuration](#)

[Email Deliverability](#)

[Communications History](#)

[Message Groups](#)

[Email to Slate Gateway](#)

[Microsoft Outlook Add-in](#)

Deliver Configuration

This page enables you to monitor and manage your funds and configured accounts. All balances and rates shown in US Dollars.

Balance

Total Funds	17,700.00
Debits (invoiced)	9,005.80
Debits (pending)	2,712.20
Active Balance	5,982.00

Service Rates

Service	United States	International
SMS	0.01	0.02

SMS

Funds

Timestamp	Amount	Memo
Add Funds		
03/03/2022 10:27 AM	10,000.00	
03/02/2022 01:32 PM	100.00	
02/16/2022 02:40 PM	100.00	
09/24/2021 10:58 AM	2,500.00	
06/15/2021 09:20 AM	5,000.00	

Debits (invoiced)

Month	Amount	Service
03/2022	46.91	SMS
03/2022	38.94	Voice
03/2022	1,346.40	Slate Print
02/2022	88.57	SMS
01/2022	43.82	SMS
12/2021	11.55	SMS
11/2021	0.15	SMS
10/2021	6.85	SMS
09/2021	7,415.46	Slate Print
09/2021	6.99	SMS
07/2021	0.14	SMS
06/2021	0.02	SMS

Accounts

Name	Service	Details	Status
Add Account			
	SMS/Voice	Admissions SMS Inbox / Do not forward voice calls	
	Print		

Configurations

- [Slate Template Library](#)
- [Briefcase Import](#)
- [Files](#)
- [Configuration Keys](#)
- [Slate Payments Deposit Accounts](#)
- [Person-Scoped Payment Configuration](#)

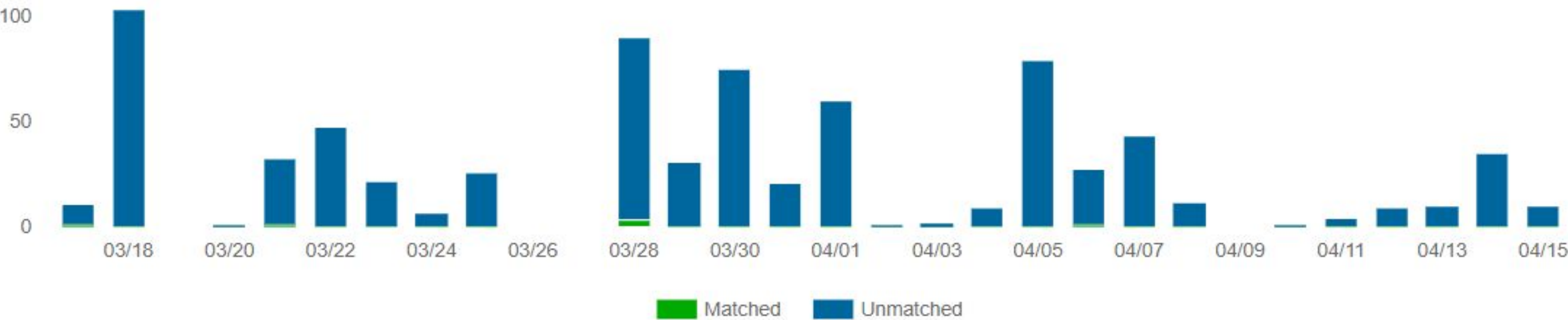
Branding, Privacy, & Ping

Setting	Value
Mobile Template	/shared/build.xslt
Embed Script on Slate Pages	Default Behavior
Embed Ping on Slate Pages	Enabled
Ping Consent Text	Default Behavior
Ping Exclude Networks	Default Behavior

```
<script async="async" src="https://admin. [redacted] com/ping">/**/</script>
```

Branding

- [Ping](#)
- [Branding Bookmarklet](#)
- [Branding Editor](#)



New Mailing

Name

Demo Mailing

Folder

Testing

/

User

Porcella, Nick

Method

Email

Template

Carnegie, powered by Underscore

Opt Out

General Unsubscribe

UTM Tracking

Enabled

Source

slate

Medium

email

Term

learn_more

Content

senior_search_01

Campaign

senior_search_22

Hide from Timeline

☐

View In Browser

☐

Save

Cancel

4

Set + Forget. But Actually.

slate

Nick Porcella

Search...

Deliver

New Mailing

Search Mailings...

Mailings

[Calendar](#)

[Campaigns](#)

[Outbox](#)

[Library](#)

[Content Blocks](#) (snippets)

[Gateway Inbox](#)

[SMS Inbox](#)

Name	Method	Status	Start Date	Updated
------	--------	--------	------------	---------

▼ Images

▼ Underscore

Anti-Melt

Junior Search

Senior Search

Sophomore Search

Yield



▼ Images

Ashlie

▶ Events

▶ Graphics

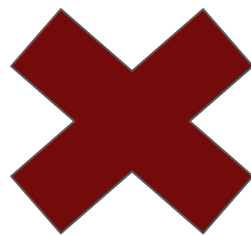
▶ Internal Portals

JT - Testing

▶ Morgan

▶ Templates

▶ Testing



▼ Images

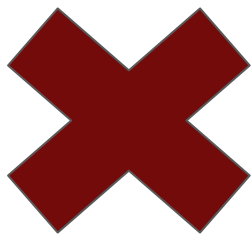


Image Properties

Image Info

Link

Advanced

URL

images/screen_shot_20210526_at_23228_pm.png

Browse Server

Alternative Text

Width

600

Height

278

Border


HSpace

VSpace

Alignment


<not set>

Preview



OK

Cancel



Visit

Button

Button

5

Let's Be *Contemplative*



DeSALES UNIVERSITY

BE WHO **YOU ARE**
AND BE THAT **WELL.**

VISIT

LEARN MORE



2755 Station Avenue, Center Valley, PA 18034 | 610-282-1100

VISIT

REQUEST MORE INFO





LEARN MORE

SCHEDULE A VISIT

APPLY NOW

grace.edu 866-974-7223

200 Seminary Drive, Winona Lake, IN 46590





VISIT

LEARN MORE

APPLY



grace.edu

866-974-7223 | 200 Seminary Drive, Winona Lake, IN 46590





{{Preferred}}, if you're in search for a place to create, explore, learn and thrive – look no further than [Alfred University's School of Art & Design.](#)

Known Around the Country.

Many of our programs have been nationally ranked by U.S. News & World Report, including fine arts, glass and ceramic arts.



No Shortage of Inspiration on Campus.

You'll have access to eight on-campus galleries and museums, as well as 126,000 square feet of studio and classroom space, including kiln rooms, photography studios and glaze studios.

Unparalleled Opportunities.

As an art and design student, you'll have the opportunity to attend summer workshops, showcase your work in senior shows, attend conferences, establish artists' residences, and more.



Ready to Join Us?

To apply to our School of Art & Design, you'll need to submit your completed application, official transcripts, essay, letter of recommendation and art portfolio by Monday, Feb. 1.

[APPLY](#)

INDIANA **TECH**

Fall in <3 with **TECH**



We started the fall semester off right with **Welcome Week**: seven days filled with virtual comedy shows, badminton tournaments, career fairs, outdoor movies and trivia nights.

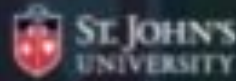
The fall semester isn't complete without homecoming, although this year it looked a little different than most. We moved to a **fully virtual homecoming weekend** that still offered plenty of chances for students and alumni to connect and engage with campus.



Our admissions office has been busy with events - both on campus and virtual - from Zoom appointments to **Explore IT**, which is a special visit day for high school students.

[LEARN MORE](#)

Why apply to St. John's University as an **Early Action** applicant?



The deadline to apply is coming up on Tuesday, Dec. 1, {{Preferred}}.

ST. JOHN'S UNIVERSITY

Early Action application deadline: Tuesday, December 1st

00 : 00 : 00 : 00
days hours minutes seconds



Priority Consideration.

Yep, that's right – when you apply by December 1st, you'll receive priority consideration for annual scholarships ranging from \$6,000 to FULL tuition.

Expedited Decision.

We don't want to keep you waiting. As an Early Action applicant, you'll also get your decision letter faster than if you applied as a Rolling Decision student.



Easy Application.

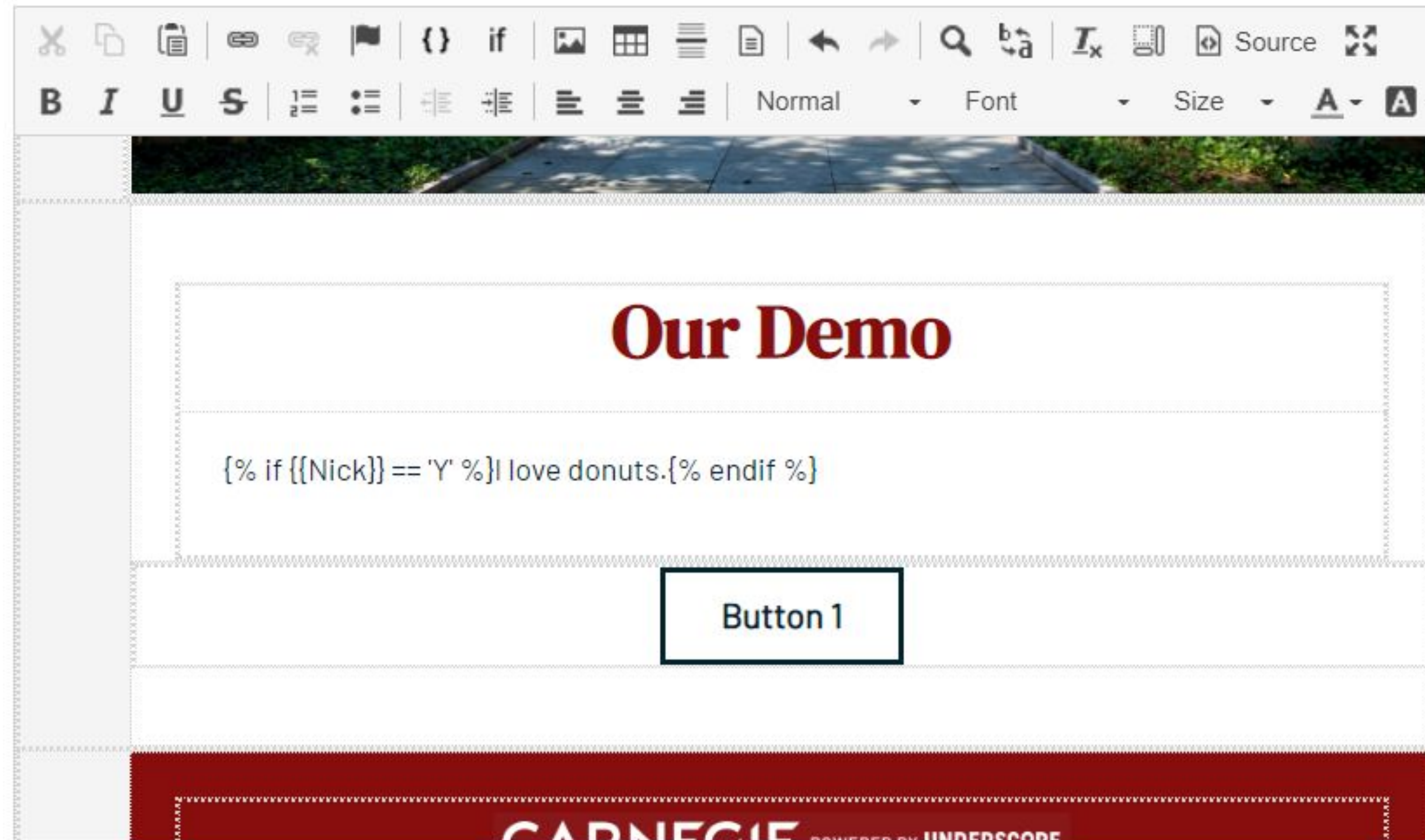
What do you need to apply to St. John's? A completed application, official high school transcript and official ACT or SAT score. Want to go the test-optional route? No problem – instead of submitting your standardized test scores, we ask for a personal essay instead.

6

{% if {{Liquid-Markup}} == 'Y' %}

{% if {{field}} == 'Y' %} {% endif %}

CARNEGIE

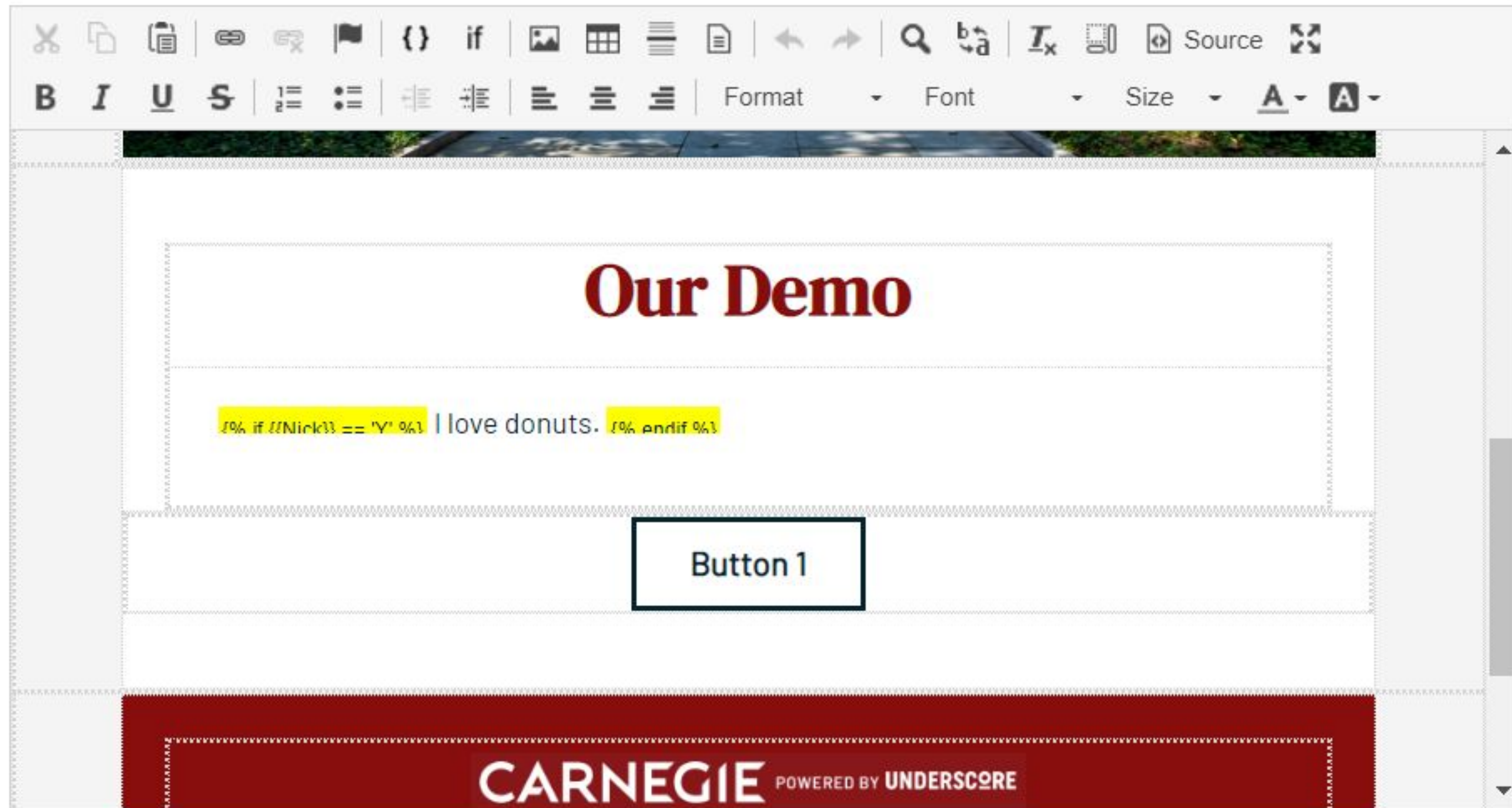


{% if {{field}} == 'Y' %} {% endif %}

```
157         </h1>
158     </td>
159 </tr>
160 <tr style="border-collapse:collapse">
161     <td align="left" class="es-m-p0t es-m-p0r es-m-p0l" style="Margin:0;padding-t
162     <p style="Margin:0; webkit text size-adjust:none;-ms-text-size-adjust:none;ms
height:21px;color:#03232f;font-size:14px">
163         {% if {{Nick}} == 'Y' %}I love donuts.{% endif %}
164     </p>
165 </td>
166 </tr>
167 </tbody>
168 </table>
169 </td>
170 </tr>
171 </tbody>
172 </table>
```


{% if {{field}} == 'Y' %} {% endif %}

CARNEGIE



{% if {{field}} == 'Y' %} {% endif %}

Message

Sender

"Underscore" <info@underscorehighered.com>

Recipient

CC

Subject

Subject

Preheader

Our Demo

I love donuts.

Button 1

Close

{% if {{field}} == 'Y' %} {% endif %}

Edit Query

User
Base
Execution Mode

[Nick Porcella](#)
Prospects
Retrieve only the new record

Exports

Nick Porcella

Rocco Porcellio

Filters

[Check Logic](#)

Matching Rows: 3

Last Name Contains

LIKE porcell

Edit Part

Status
Name
Source
Display Width
Field Width
Value if Exists
Value if Not Exists

Active

Nick Porcella

Existence

e.g, 100px or 75%

Y

N

Display Filters

Filters

Filter

NOT

(

OR

)

Last Name Contains

LIKE Porcella

Save

Delete

Cancel

Edit Properties

Edit Permissions

Set Interaction

Preview Results

Display SQL

Save Copy

Export

Literal

Existence

Rename Exports

Filter

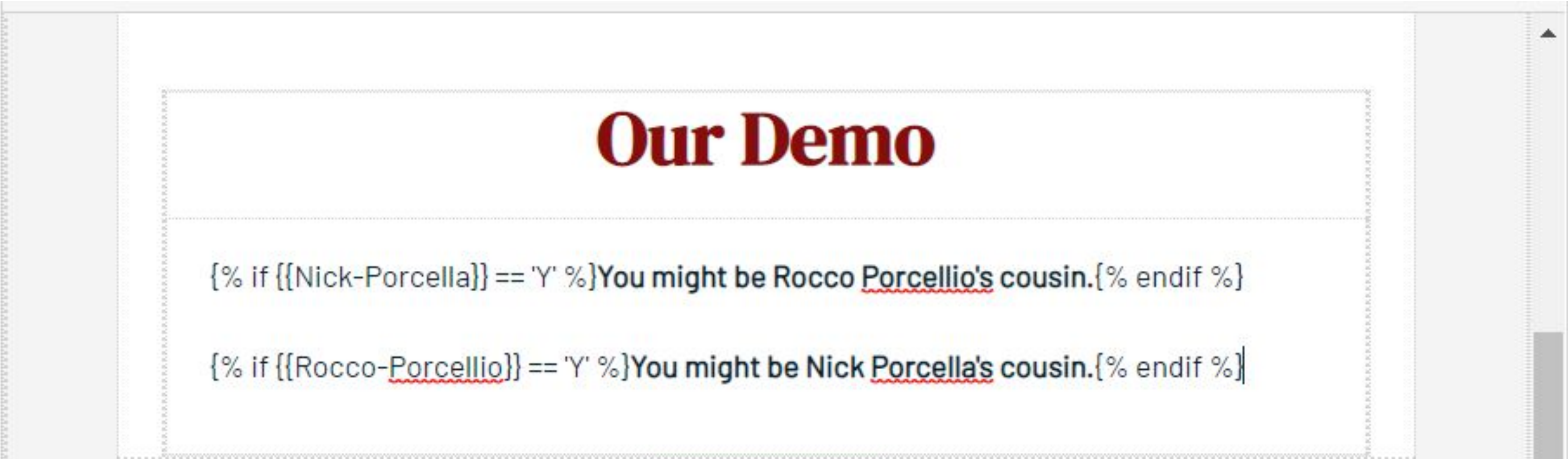
OR


NOT

(

)

{% if {{field}} == 'Y' %} {% endif %}





Our Demo


You might be Rocco Porcellio's cousin.

Button 1

Merge Fields

Nick-Porcella	Y
Rocco-Porcellio	N

Button 1



Our Demo

You might be Nick Porcella's cousin.

Button 1

CARNEGIE POWERED BY UNDERSCORE


Merge Fields

Nick-Porcella	N
Rocco-Porcellio	Y

7

Not Exactly Blockchain

Prompt Structure

Folder	<div>Undergraduate ▾</div> <div>Programs ▾</div> <div>▾</div>
Key	<div>program_ug<div></div></div>
Value	<div>Exercise Science</div>
Category	<div>College of Health and Human Services</div>
Short Value	<div></div>
Index Value	<div></div>
Export Value	<div>BS.ES</div>
Export Value 2	<div>College of Health and Human Services</div>

[SMS Inbox](#)

×

Edit Snippet

Key

test_program_ug

Type

String (Discrete Values)

Status

Active ▾

Value

College of Health and Human Services

Snippet

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Format ▾

Font ▾

14 ▾

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A ▾

The College of Health and Human Services is a great avenue to find a major you enjoy! Exercise Science is my favorite.

Save

Save as Copy

Delete

Cancel

Export

Edit Part

Status

Active

Name

Inquiry UG Program

Source

Export / Other / Inquiry UG Program

Display Width

e.g, 100px or 75%

Field Width

Export Value

Category

Format Type

Default

Null Value

Display Filters

Filters

Filter

NOT

(

OR

)

Save

Delete

Cancel

CARNEGIE

Edit Message

Sender

Recipient

{{Email}}

CC

Subject

test

Version 1

Preheader ⓘ

Email

Inquiry-UG-Program

Preferred

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Format

Font

Size

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Hi {{Preferred}},

[[Inquiry-UG-Program | snippet: "test_program_ug"]]

SaveCancel

🎥📎

8

The Tale of Two Inboxes



Nick Porcella

Search...

Deliver

Search Mailings...

New Mailing

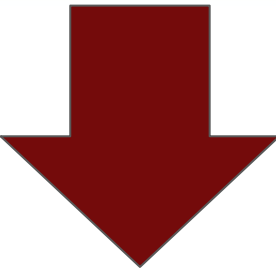
Name	Method	Status	Start Date	Updated
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Mailings


- [Calendar](#)
- [Campaigns](#)
- [Outbox](#)
- [Library](#)
- [Content Blocks](#) (snippets)
- [Gateway Inbox](#)
- [SMS Inbox](#)

SMS Inbox

SMS Inbox was deprecated in 2017. It is strongly recommended that all organizations migrate to [Inbox](#), which offers many enhancements to the legacy SMS Inbox.





Nick Porcella


Search...


Inbox

Search Inbox...

Received	Message	Sender	Role
----------	---------	--------	------

Inbox

 Inbox

 Snippets

Inbox

- [Inbox Live](#)
- [Groups](#)
- [Snippets](#)
- [Switchboard](#)

Conversation with

Your Slate login code is 290859. This code will expire in 5 minutes.

04/13/2022 3:15 PM

Your Slate login code is 158718. This code will expire in 5 minutes.

04/13/2022 3:23 PM

Your Slate login code is 254407. This code will expire in 5 minutes.

04/13/2022 3:24 PM

Your Slate login code is 312831. This code will expire in 5 minutes.

04/13/2022 3:36 PM

Your Slate login code is 092440. This code will expire in 5 minutes.

04/13/2022 3:41 PM

Your Slate login code is 840404. This code will expire in 5 minutes.

04/14/2022 8:48 AM

Your Slate login code is 933501. This code will expire in 5 minutes.

04/14/2022 8:50 AM

Your Slate login code is 711948. This code will expire in 5 minutes.

04/14/2022 12:19 PM

Your Slate login code is 179038. This code will expire in 5 minutes.

04/14/2022 2:19 PM

Your Slate login code is 646858. This code will expire in 5 minutes.

04/14/2022 2:55 PM

Your Slate login code is 126761. This code will expire in 5 minutes.

04/15/2022 11:29 AM

Your Slate login code is 673142. This code will expire in 5 minutes.

04/15/2022 11:48 AM

Send and Resolve

PrevNextCancel

Sender

Recipient

Master Number (+1

via text message to +1

Slate Inbox is great for keeping organized.

43/160 chars (0.01 credits)

Snippets

History

Search Snippets...

9

On To The Next One: Refreshes

Best Practices

- Things to consider...
 - Choose an appropriate time of year
 - Are mailings still running?
 - When do you want to switch to the next class? (Juniors for F23 becoming Seniors for F23?)
- How to do this...
 - Ensure all mailings for your population are stopped
 - Inactivate Population Rule
 - Remove all students from population through Retroactive Refresh
 - Edit Population Rule name and filters to bring in new students
- Once you're ready for the new campaign to launch...
 - Activate Population Rule
 - Bring in new students through Retroactive Refresh

10

Reporting: Going Full Circle

Funnel + Conversions

CARNEGIE

All Reports

2021-22 Funnel & Conversions

Edit

Folder

Underscore / Enrollment Strategy

Current as of

04/15/2022 at 02:46:36 PM ET

Status

Completed successfully.

Export to PDF

Export to Query

Funnel Year-to-date

	Prospects			Inquiries			Submitted Applications			Completed Applications			Admits			Deposits			Net Deposits		
Metric	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%
First-year		74,734			637		1,876	3,048	62%		2,633			2,320			152			152	
Metric	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%
Transfer		2			28		394	133	-66%		100			73			11			9	
Metric	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%	FA21	FA22	%
Graduate					2		34	50	47%		42			24			2			2	

Conversions Year-to-date (First-year)

	Prospects	Inquiries			Submitted Applications				Conversion Rates		
Metric	Total	Pro:Inq	Stealth	Total	Pro:App	Inq:App	Stealth	Total	Pro:Inq	Pro:App	Inq:App
Fall 2022	74,734	238	399	637	787	114	2,147	3,048	.3%	1.05%	17.9%
	Prospects	Inquiries			Submitted Applications				Conversion Rates		
Metric	Total	Pro:Inq	Stealth	Total	Pro:App	Inq:App	Stealth	Total	Pro:Inq	Pro:App	Inq:App
Fall 2021					6		1,870	1,876			

Message Mailings

CARNEGIE

Metric	Total	Unique Opens	Open Rate	Unique Clicks	Click Rate	Click Through Rate
2022 Campaign						
#01 Yield	2272	1565	68.9%	205	9%	13.1%
#01 Yield Responsive - Events	1823	865	47.4%	6	.3%	.7%
#02 Yield	1982	972	49%	32	1.6%	3.3%
#02 Yield Responsive	1843	714	38.7%	9	.5%	1.3%
#03 Yield	1611	975	60.5%	47	2.9%	4.8%
#04 Yield	1459	888	60.9%	26	1.8%	2.9%
#05 Yield	1310	766	58.5%	24	1.8%	3.1%
#06 Yield	1785	848	47.5%	25	1.4%	2.9%
Total	14085	7593	53.9%	374	2.7%	4.9%

Metric	Total	Unique Opens	Open Rate	Unique Clicks	Click Rate	Click Through Rate
2022 Campaign						
#01 Yield Parent	1625	1081	66.5%	171	10.5%	15.8%
#02 Yield Parent	920	530	57.6%	35	3.8%	6.6%
Total	2545	1611	63.3%	206	8.1%	12.8%

Metric	Admits	Deposits	Net Deposits	Yield Rate	Melt Rate
2021 Yield Campaign					

Data specs: The *Campaign* line includes all students that were admit status upon launch of the campaign and those that deposited afterwards. The *Total* line includes all admits and deposits that may or may not have received messaging.

Metric	Admits	Deposits	Net Deposits	Yield Rate	Melt Rate
Fall 2022 - Campaign	2,333	136	136	5.8%	.0%
Fall 2022 - Total	2,560	161	161	6.3%	.0%

Demo Ping Report - Page Data

Edit

Folder [redacted]
Current as of 04/15/2022 at 02:49:54 PM ET
Status Completed successfully.

Export to PDF
Export to Query

Inquiries - Admission Website - Past 2 Weeks

Metric	Total FA2022	Total FA2023	Total FA2024
https://www.[redacted]edu/	689	47	4

Applicants - Admission Website - Past 2 Weeks

Metric	Total	Unsubmitted Applications	Submitted Applications
https://www.[redacted]edu/	2461	161	2035

Applicants - Slate Pages - Past 2 Weeks

Metric	Total	Unsubmitted Applications
https://apply.[redacted]/apply/		

Edit Part

TypeData Table

Headinghttps://www.[redacted]u/

Row TypeGroup By

Null Values☐ Show null/missing values

Series Total☒ Show series total

Number Format#

Group By

Exports

Export

Filters

Matching Rows2,463

Filters

FilterNOT(OR)Settings

Ping Count by URL, TimestampCount >= 1; URL LIKE https://www.[redacted]/; Start Date (optional) = today-14; End Date...



Questions + Answers

Call in the Slate experts

Consulting on all aspects of Slate—we're here to help!

+ SLATE & COLLEGEEXPRESS

Underscore can assist with setting up this important integration piece for your lead generation tracking and reporting. With custom source formats and data mapping, ensure all the data is in the right place for every student.

+ SLATE & DIGITAL

Whether embedding inquiry forms on landing pages or building out data feeds to load digital ad conversions, Underscore can provide the guidance to collect all the relevant data you need in your Slate instance.

+ APP TRACKING

The ultimate goal of any campaign is enrolled students. With Slate, and our technical experts, we can ensure we are tracking full application conversions to show true ROI with your digital and other marketing efforts.

+ SLATE TRAINING + WORKSHOPS

Underscore follows the Technolutions Implementation Road Map and will train your team to maintain your instance. We also provide on-campus and virtual workshops before, during and after an implementation - really we're here for you at any time!

+ PORTAL DEVELOPMENT

Our Slate innovators can build out user-friendly portals and other features of Slate to ensure your students experience all the benefits of your instance.

+ IMPLEMENTATION

We're here to help with new implementations or re-implementations; getting it right the first time or reinvesting in an optimized set-up - we'll help you maximize your CRM investment.

Thank You!



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