

## Admin – Solicitation Tool

### To Create a Solicitation Campaign

1. Login to admin.ucr.gov.
2. Select the “Solicitation” tab from the menu.
3. Click **Create Campaign**.
4. Enter a campaign name in the space provided.
5. Using the “To” drop-down menu, select the type of carrier the emails are targeting.
  - a. The recipient types are “Unregistered”, “Mail Merge”, or “New Entrant”.
6. Using the “Year” drop-down menu, select the desired year.
7. Using the “Jurisdiction” drop-down menu, select the desired jurisdiction.
8. **NOTE: The information within the blue outlined box cannot be edited once a campaign has been saved.**
9. Enter the desired email address in the “Reply To” field.
10. Enter the subject of the campaign in the space provided.
  - a. This will appear as the subject line in the emails sent to the carriers in this campaign.
11. Enter the email message in the space provided, adjusting the font and text layout as needed.
12. Use the “Merge Fields” drop-down menu to add the USDOT number, legal name, and DBA Name to the email, where applicable.
  - a. Place the cursor where the merge field value (e.g. USDOT) is to be inserted into the body of the email.
  - b. Click on the desired value in the “Merge Fields” menu.
  - c. Repeat steps 12b and 12c until all desired values are inserted.
  - d. Each carrier’s information will replace the words “USDOT”, “Legal Name”, and “DBA Name” in the email upon creation.
  - e. Please see the example below.

Message

**Campaign Name**

Texas 2019 Unregistered

To	Year	Jurisdiction
Unregistered ▾	2018 ▾	South Carolina South Dakota Tennessee Texas

This information cannot be edited once a campaign has been saved.

**Reply To**

helpdesk@ucr.gov

Body

Dear Motor Carrier Official:

Font

**Merge Fields** ▾

- USDOT
- Legal Name
- DBA Name

Merge Field Values →

EXAMPLE:

Merge Fields ▾

Our records indicate that USDOT# (Place cursor here & click the Merge Fields drop-down menu, then click on "USDOT" to insert carrier's USDOT number here.) (Place cursor here & click on "Legal Name" to insert carrier's legal name here.) is registered with the Federal Motor Carrier Safety Administration (FMCSA) to operate in interstate commerce and your 2019 UCR is due immediately. UCR registration...

**Result will be:**

Our records indicate that USDOT# {usdot}{legal\_name} is registered with the Federal Motor Carrier Safety Administration (FMCSA) to operate in interstate commerce and your 2019 UCR is due...

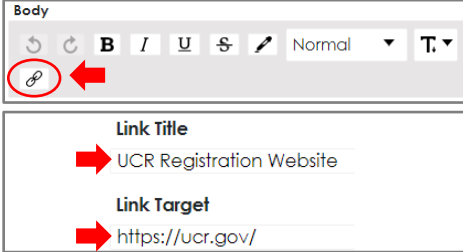
**Carrier's email will read:**

Our records indicate that **USDOT# 999999, Example Transportation, LLC** is registered with the Federal Motor Carrier Safety Administration (FMCSA) to operate in interstate commerce and your 2019...

13. Add any desired links by placing the cursor where the desired link is to be added into the email.

14. Click on the “Link” icon found on the left side in the toolbar.

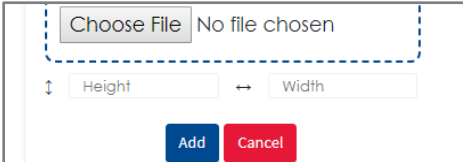
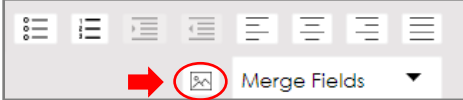
- Enter the “Link Title” in the space provided.
- Enter the actual link under “Link Target”.
- Click the box next to “Open link in new window” to allow each linked page to open in a separate window.
- NOTE: By adding a link to the email, it helps ensure the registrant ends up on the official UCR website as well as any other websites desired.**



15. Add any desired images by placing the cursor where the image is to be added into the email.

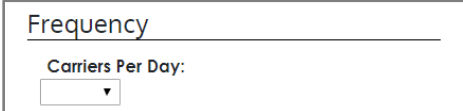
16. Click on the picture icon found on the right side of the toolbar.

- To add an image, either drag & drop the file into the box, or click on the “Choose File” button to select an existing image.
  - Use the height and width adjustment arrows to adjust the image as needed.
  - Click **Add** once the file is chosen.
  - Hover the cursor over the image and “L-C-R” will appear below the image. Chose “L” for left placement, “C” for center placement or “R” for right placement.




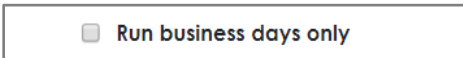
17. In the “Frequency” section at the top right of the screen, click on the “Carriers Per Day” drop-down menu.

- Choose the number of recipients for this email to reach each day, ranging from 50 per day to 10,000.
- Select “All” if the campaign should run continuously until an email has been sent to all carriers in this campaign.
- Check the box to run the campaign on business days only, or leave the box unchecked to allow the campaign to run daily.



18. Using the “Schedule” drop-down menu, select “Single Run” or “Recurring”.

- If “Single Run” is selected, the campaign will run once. Once the emails have all been sent to the selected recipients, the campaign status will change to “Complete”.
- If “Recurring” is selected, the campaign will continue to run until the status is manually changed to “Inactive”.



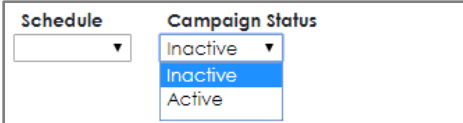
19. Using the “Campaign Status” drop-down menu, select “Active” or “Inactive”.

20. If desired, click on the box next to “Send an email to me each time the campaign runs”.

- This email will be sent to the creator/owner of the campaign.

21. The campaign can be canceled at any time before it is saved by clicking **Cancel**.

22. Once the information has been entered click **Save Campaign**.



23. To review the email as it will appear to the email recipients, click the **Test** button found at the bottom left of the screen.
  - a. Enter any DOT number into the box when it appears then click **Run Test**.
  - b. An email will be sent to the creator/owner of the campaign.
  - c. Note: Since this is a test, an email will not be sent to the carrier.
  - d. If the email was sent successfully, a box will appear stating the test was a success. Click **Close**.
  - e. Make any necessary changes and click **Save Campaign**.
  - f. Click **Test** to re-test the changed document if desired. Once emails have been sent to all the carriers in a campaign, the status will change from "Active" to "Complete".
  - g. The "Campaign Status" can be manually changed at any time.
24. If at any time there is a problem with an active campaign, the status will change from "Active" to "Error".
  - a. To fix the error, change the status back to active.
25. At any time, an Excel report can be generated containing the USDOT numbers along with the email addresses the campaign was successfully sent to.
  - a. Click the **Export** button to generate the report.

Test Email Details

Please provide the USDOT that you would like to test your email template with

Test USDOT:

**Run Test**

**Campaign Status**

Active ▼

Inactive

Active

Complete

**Error**

## To Edit an Existing Solicitation Campaign

1. Login to admin.ucr.gov.
2. Select the Solicitation tab from the menu to view the campaign overview screen.
3. The campaigns can be filtered by entering the required information in the spaces provided.
4. The available filters are "Owner", "Campaign Name", "State", "Year", and "Status".
  - a. The "Owner" of a campaign is the email of the creator.
  - b. The filters can be used in any combination, or individually, if desired.
5. To select a campaign, click on the desired line.
  - a. Reminder: The information within the blue outlined box cannot be edited once a campaign has been saved.
  - b. Edit any desired fields not inside the blue box.
  - c. Once the campaign has been modified, click **Save Campaign**.

**Create Campaign** Owner  Campaign Name

State  Year  Status  **Apply Filter**

Owner	Campaign Name	Base State
helpdesk@ucr.gov	2018 Unregistered	Texas
helpdesk@ucr.gov	2019 Unregistered	Ohio

**To** Unregistered ▼ **Year** 2018 ▼ **Jurisdiction** South Carolina, South Dakota, Tennessee, Texas

**This information cannot be edited once a campaign has been saved.**