Responsive Email Template Setup Instructions

Overview

Responsive email creation requires more in-depth knowledge of HTML, CSS and Media Queries. It is recommended you use a code editor such a Dreamweaver or Notepad++ (or any of the many others out there) to help you view and edit the code. The templates in this kit are designed to get you started designing and building your first responsive emails however because of the way responsive emails have to be created you will most likely not be able to update or edit a responsive email with a wysiwyg without breaking the code that makes it responsive. This also means that hand coding all your emails will take extra time in the development and testing process so make sure that is accounted for in your campaign project plans.

Choosing to take this extra time to create responsive emails depends on how your constituents behave and what types of emails you send to them so the choice has to be made on an organization by organization basis. Some tools to help you understand how many of your constituents are using mobile devices to view your emails are [Email on Acid](http://www.emailonacid.com/email-preview/analytics) and [Litmus](http://litmus.com/email-analytics) which are paid services you can use which just require dropping in a little extra code with each email send. Additionally, at our current state in the industry not all email clients support the code and techniques that allow for responsive emails. Here is a list that will help you see who does: <http://stylecampaign.com/blog/2012/10/responsive-email-support/>

If you get stuck, any of the instructions are unclear or incorrect please reach out to our team in the Community and we’ll be automatically notified and work with you to resolve your issue. <http://community.convio.com/t5/Webinars-Kits-Downloads/bd-p/kitstemplatesdownloads>

Email and eCard Templates - All email templates use [Media Queries](http://mobile.smashingmagazine.com/2010/07/19/how-to-use-css3-media-queries-to-create-a-mobile-version-of-your-website/) in embedded CSS within the email stationery that detect mobile devices of a certain width and then change the CSS layout of the email structure by overriding the existing(normal) styles of the email template to fit the new width.   
  
Notes about the email templates:

* + Emails start with a fixed width and only shrink to fit smaller devices. If the device you are using has a large enough screen to view the full email then that is what will be displayed.
  + Not all email clients and devices support Media Queries. For example: Gmail, Windows Phone 6.1 & 7, Microsoft Surface, certain 3rd party apps etc. This is unfortunate because there is no way to optimize your emails for these clients without this ability. However, by using the techniques outlined in this kit you will reach the [vast majority of mobile users](http://www.campaignmonitor.com/resources/will-it-work/email-clients/) and everyone else will see your standard email template as they would anyway.
  + Many of the tables, cells, rows, images, paragraphs have added CSS classes or IDs in order to control those elements with the media queries. Those Classes and IDs must be maintained in order for the mobile version of the email to work properly so be careful not to remove them when making changes to the code.
  + All CSS overrides are done using the !Important property which overrides the standard inline properties normally used in email design and coding.
  + CSS attribute selectors such as [class=footer] are used in the CSS in order to prevent Yahoo email client from rendering all your CSS as normal embedded CSS ([see article](http://www.emailonacid.com/blog/details/C13/stop_yahoo_mail_from_rendering_your_media_queries)).

Responsive Email Template Types

|  |  |  |
| --- | --- | --- |
| Email Stationery with Right Column    Email Stationery with Right Column on iPhone | eCard Stationery | |
| **C:\Users\ken.cantu\Desktop\Responsive Emails Kit\Responsive Emails Kit\Mobile standard email with right column\screenshots\email_right_column_responsive_iphone_part1.PNG** | Email Stationery with Right Column on iPhone continued.  **C:\Users\ken.cantu\Desktop\Responsive Emails Kit\Responsive Emails Kit\Mobile standard email with right column\screenshots\email_right_column_responsive_iphone_part2.PNG** |
|  |  | |

Setup Instructions

**Prepare Your Images and Upload**

1. In the kit there is a folder called **Email-Kit-Images-Mobile** which contains the images used in all the responsive templates. You can use some of these images as-is (ex: facebook icon, twitter icon, gradients etc.) but some you will want to modify such as banner images, organization logos, or button colors. Within each email folder you’ll find the .PSD (Photoshop) files in the **Design** folder for you to modify as needed. Remember to keep the dimensions of the image the same so they still fit within the templates.
2. Once you have modified any images you need to, add them to the **Email-Kit-Images-Mobile** folder along with the rest of the images. Then you will upload these photos to Luminate Online via the [Image Library](http://help.convio.net/site/PageServer?pagename=Admin_Image_Library) (Recommended) or you can upload them to your FTP if you have access (*if you don’t have access then contact Support and they can provide you with the username, password and URL for your instance*).
3. If using the Image Library make sure you note how you named each of the files so you can find them easily in future steps.
4. If uploading to the FTP, note the pathway to the folder you uploaded the images to as you will need that information later.

**Prepare Your HTML Files**

1. Open the templates folder of the email template you wish to use in the kit. In this example we will use **Mobile eCard**. All the templates are structurally very similar so you can use the following instruction for all the responsive templates.
2. For this email template we’ll use a stationery template and a message content template. In the folder open the templates **ecard\_stationery\_responsive.html** and **ecard\_content\_responsive.html** in your favorite text editor such as Notepad or Dreamweaver.
3. Starting with the **ecard\_stationery\_responsive.html** template find and replace the placeholder of “[short\_name] “with your Luminate shortname in all links. Example: http://[short\_name].convio.net/ will become <http://abc.convio.net/> for an organization with a shortname of “abc”.   
     
   If you have a custom domain (so your URLs are something like “http://my.nonprofit.org/site/PageServer” instead of “<http://abc.convio.net/site/PageServer>” ) you may need to change more than just the shortname. For Custom Domains do a find for “http://[shortname].convio.net” and replace it with “http://www.yourcustomdomain.org” .
4. Do a search for “[form\_id]” and replace it with the unique form id of the donation form you want to link to.

Ex: [http://abc.convio.net/site/Donation2?idb=[[S76:idb]]&df\_id=[form\_id]&[form\_id].donation=form1](http://abc.convio.net/site/Donation2?idb=%5b%5bS76:idb%5d%5d&df_id=%5bform_id%5d&%5bform_id%5d.donation=form1)

would become [http://abc.convio.net/site/Donation2?idb=[[S76:idb]]&df\_id=1021&1021.donation=form1](http://abc.convio.net/site/Donation2?idb=%5b%5bS76:idb%5d%5d&df_id=1021&1021.donation=form1)

1. You will also want to add the URLs for your Facebook and Twitter accounts. Do a search for “<a href="#">” and replace the first one with your Twitter URL and the second one with your Facebook URL .

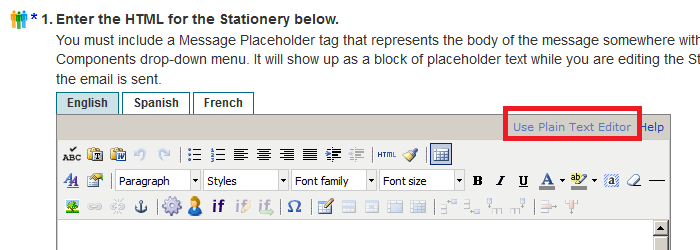
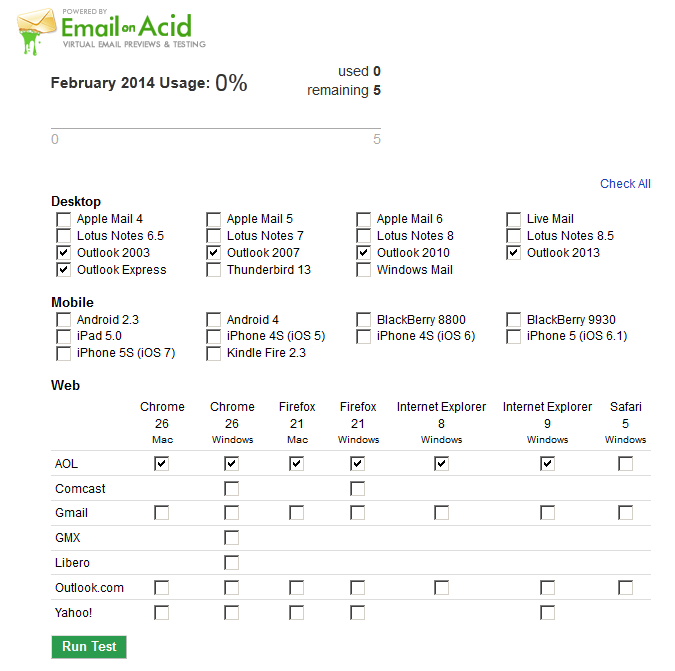
Ex: <a href=”<http://www.twitter.com/YourOrg>”>

Ex: <a href=<http://www.facebook.com/YourOrg>”>

1. Update footer information text with your organization's name and address.
2. ***OPTIONAL***: For more advanced users who know HTML and CSS, you can change the font/background/border colors in the file do a find and replace of the color hex codes. For example: Do a find of “#000” and replace with “#FFF” if you want to change any color that is black to be white.
3. Save the text file.
4. Repeat the same steps for the **ecard\_content\_responsive.html** template as well. This one is shorter so it won’t take as long.

**Build Your Email in Luminate Online**

The best approach for the following steps is to work with the WYSIWYG turned off. There are many classes, IDs, and embedded CSS that are very easily removed when using any kind of WYSIWYG. Because removing even one of these elements can make emails render in very odd ways we highly recommend you just find and replace text, image pathways, link pathways and branding elements by hand coding to make sure you keep all existing classes and IDs.

1. Log in to your Luminate administrator site.
2. Create a new stationery.
   1. Under Email > Click on Stationery
   2. Click Create New Stationery
   3. Title the stationery something you’ll remember.
   4. To make your email message render consistently in web-based email clients, you will need to include any styles that you reference in that email directly in the body of your email message. As a result, we will not be using the Style Sheet section in step 2. Leave all this blank and click next to go to step 3.
   5. In step 3, make sure your WYSIWYG is turned off by clicking Use Plan Text Editor link in the top right corner of the editor.   
      
   6. In your text editor, make sure you have made all stationery updates to your copy, image pathways, link pathways, and branding to the **ecard\_stationery\_responsive.html** template..
   7. Then, copy all the code from the template file you just updated and paste it into the stationery HTML.
   8. Save.
   9. Click Next. Format the text only version of the stationery.
   10. Publish stationery.
   11. You might need to return to this step to make updates if any part of the email is not rendering correctly. Anytime you return to this code make sure you are editing it with the WYSIWYG turned off.
3. Creating a new email campaign and a new message
   1. Create a new email campaign and create a new email message in that campaign.
   2. Add the message envelope information and subject line.
   3. In step 3, choose the stationery you created earlier from the kit template.
   4. In step 4, make sure your WYSIWYG is turned off. Then, open **ecard\_content\_responsive.html** in your favorite text editor. Copy all code from the template and paste it into the message area.
   5. Save.
   6. Update images, link the buttons, and make sure links in the text are correct as you did above. You can also update or modify your copy here too.
   7. Click Next. Format the text only version of the message.
   8. Publish and send yourself test messages to both your standard email account and to an email account that you can access through a mobile device to confirm everything is working.
4. In the Summer 2012 release there is new integration with Email On Acid tool which can be used for testing your emails in multiple email clients. Luminate grants you a limited number of free tests per month (5) so this would be a great use of those credits. If all tests look good, click Approve.  
     
   

That’s it! You’re done!

Final Thoughts

Not all the stationery templates have accompanying content templates as well. This is because these templates have more open area in the center part of the email that allow you to either craft a more minimized email or one custom to your needs.

If you have any questions or feedback about these instructions please reach out to use via the Community at:   
<http://community.convio.com/t5/Webinars-Kits-Downloads/bd-p/kitstemplatesdownloads>