Non-Responsive Email Template Setup Instructions

Overview

Below you’ll find the setup instructions to be used with all the standard (non-responsive) email templates included within this kit. We’ve separated the responsive and non-responsive setup instructions because of complexity (the responsive setup instructions are in a separate document within this kit). Responsive email creation requires more in-depth knowledge of HTML, CSS and Media Queries where the following templates can be implemented with only the “Find and Replace” functionality in your favorite text editor (Such as Notepad or Dreamweaver) and the Luminate Online WYSIWYG .

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>

Standard Email Template Types

|  |  |
| --- | --- |
| Email Stationery with Right Column | Email Stationery without Right Column |
| Email Stationery Autoresponder | Email Stationery Newsletter |
| Email Stationery Newsletter Short | eCard Stationery |
| From the Desk Of \_\_\_\_\_\_ Template |  |

Setup Instructions

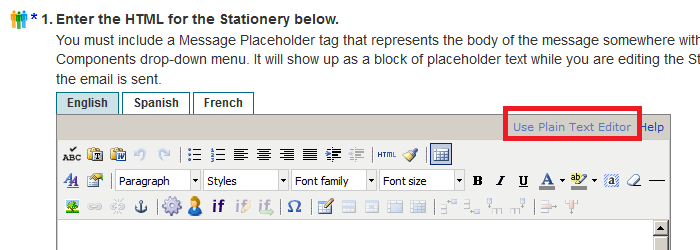
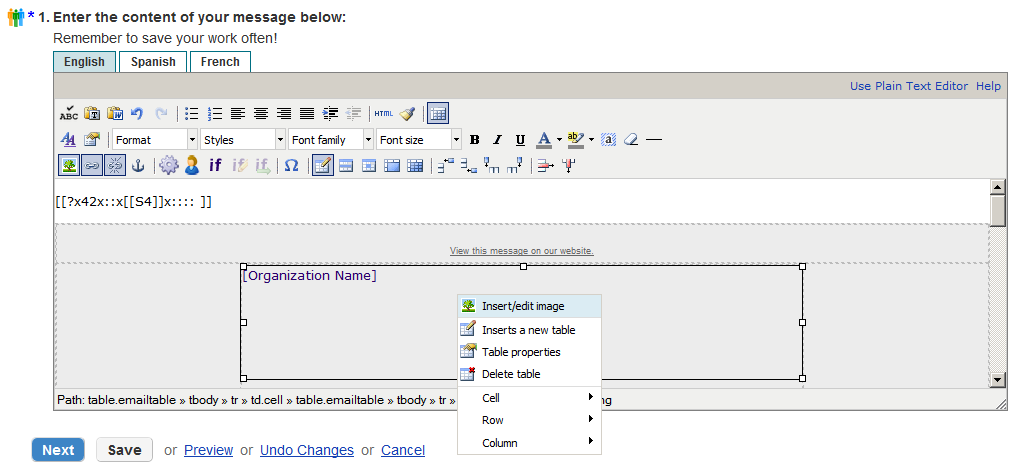
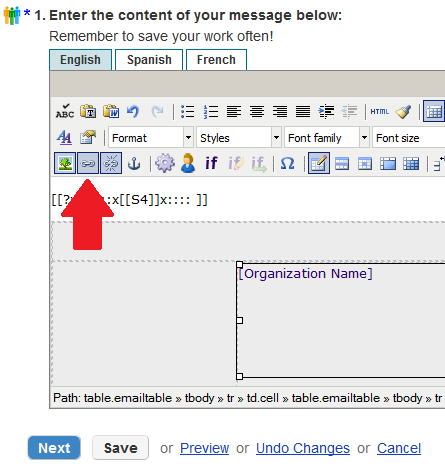
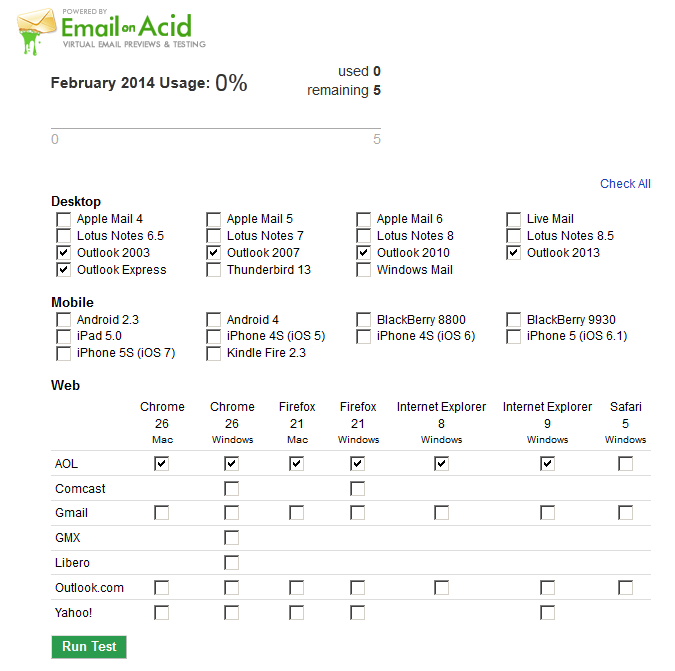
**Prepare Your Images and Upload**

1. In the kit there is a folder called **All-Email-Kit-Images** which contains the images used in all 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 **All-Email-Kit-Images** 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 **Email Stationery with Right Column** in the **Standard Emails** folder. All the templates are structurally very similar so you can use the following instruction for all the non-responsive templates.
2. For this email template we’ll use a stationery template and a message content template. In the folder open the templates **email\_stationery\_right\_column.html** and **email\_content\_right\_column.html** in your favorite text editor such as Notepad or Dreamweaver.
3. Starting with the **email\_stationery\_right\_column.html** template find and replace the placeholder of “[short\_name] “with your Luminate shortname in all links like http://[short\_name].convio.net/ will become <http://abc.convio.net/> for 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. Save the text file.
5. ***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.
6. Save the text file.
7. Repeat the same steps for the **email\_content\_right\_column.html** template as well. This one is shorter so it won’t take as long.

**Build Your Stationery in Luminate Online**

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. If asked, choose to “Start with a blank page”.
   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.   
        
        
        
      Then, copy all code from the **email\_stationery\_right\_column.html** template file you just updated and paste it into the stationery HTML.
   6. Save.
   7. You can turn the WYSIWYG back on now.
   8. Swap out the banner or logo image placeholder with the banner you customized and uploaded to the Image Library. Just right click on where the image should be and choose “Insert\edit Image”.   
      
   9. On the next screen you can choose a new image from the image library or type in the URL of the FTP pathway where you uploaded your picture.
   10. Repeat these steps for all the images in the template.
   11. For any image that needs to be hyperlinked, left click on the image to select and then chick on the hyperlink icon in the top left of the wysiwyg. In the following window you can navigate to the donation form or web page you want this image to link to or you can type in the URL manually.   
       
   12. Don’t forget to swap out the social media image placeholders with the images you uploaded to the Image Library. If you don’t use Facebook or Twitter you can remove these completely.   
         
       For the “Share” social media icons you **don’t have to** update the links these are pointing to unless you want to change the message they are saying. Both are below for reference; make sure to maintain the URL structure or else they may not post correctly. \*Note: with Facebook you can only share the URL.
       1. Twitter:  
          [http://www.twitter.com/home?status=Check+out+this+monthly+eNews!+http://[short\_name].convio.net/site/MessageViewer?em\_id=[[A8]].0](http://www.twitter.com/home?status=Check+out+this+monthly+eNews!+http://%5bshort_name%5d.convio.net/site/MessageViewer?em_id=%5b%5bA8%5d%5d.0)
       2. Facebook: [http://www.facebook.com/share.php?u=[[T1:http://[short\_name].convio.net/site/MessageViewer?em\_id=[[A8]].0](http://www.facebook.com/share.php?u=%5b%5bT1:http://%5bshort_name%5d.convio.net/site/MessageViewer?em_id=%5b%5bA8%5d%5d.0)]]
   13. Update footer information text with your organization's name, social media sites like Twitter or Facebook page if you have them and address.
   14. Update the links to point to your donation form and your organization’s website by highlighting the text and then clicking the hyperlink icon like you did above.
   15. Click Next.
   16. On this page you will format the text-only version of the stationery. Click the “Update Plain Text” button to get started and then just removed excess spaces as you see fit.
   17. Click Next. Upload the screenshot of this stationery found in the Screenshot folder of the kit to be the thumbnail of this email. Click Next again.
   18. Preview and check that all images are appearing correctly and links are working.
   19. Publish stationery.
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 **email\_content\_right\_column.html** in your favorite text editor. Copy all code from the template and paste it into the message area.
   5. Save.
   6. You can turn the WYSIWYG back on now.
   7. 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.
   8. Click Next. Format the text only version of the message.
   9. Publish and send yourself a test message to confirm everything is working correctly.
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

As you use and reuse these emails some random code might be inserted by the wysiwyg which could cause odd rendering issues in email clients. If that happens, we recommend you start from the template again instead of copying a previous version.

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>