

Creating Messaging Templates

Using Images in Email

Portal Image Wiki Ref: <https://wiki.smartbutton.com/default.asp?W338>

Images utilized in Email templates can be uploaded into and hosted by the SBLP database.

- 1) To upload images, go to Web >> Patron Portal >> Portal Image Library
- 2) Click on the "Add Portal Image" in the upper left corner
- 3) Name your image
- 4) Select Portal Image Type "Hosted Image"
- 5) Click the Select button to browse your computer for the image you would like to upload.

(Note: for multiple images repeat steps 1-5 for all images)

Best Practice: When using images in Email templates, consider slicing larger images into smaller images. Utilizing the table tools (see below for more information) within the HTML Editor will allow you to maintain the appearance of the larger image but will 1) reduce the load time of the email for the recipients and 2) decrease the probability of the email being tagged as spam. But be careful, too many images will produce the same result. In addition to image size, include alt text for the images as this will provide the recipient meaningful information and may aid in preventing the email from being tagged as spam.

On-Demand vs. Campaign Email Templates

The main difference between an On-Demand Email Template and a Campaign Email Template is the mechanism by which it is sent. An On-Demand Email is triggered by member activity, whereas a Campaign Email is used for an email blast. Go to the **Messaging Wiki Ref:**

<https://wiki.smartbutton.com/default.asp?W350> for more in-depth descriptions and other Messaging information.

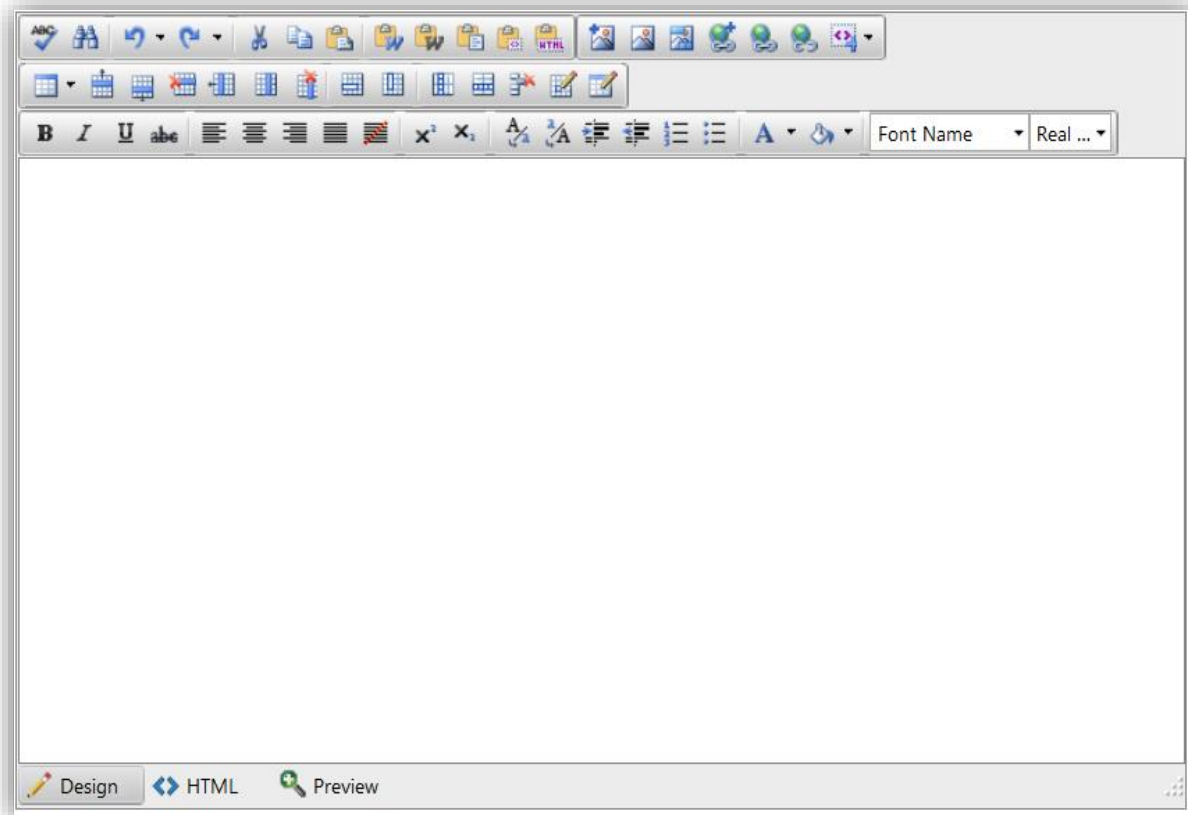
Creating On-Demand Email Templates

- 1) To create a new On-Demand Email Template go to Messaging >> Content >> On-Demand Email Template
- 2) Click on the "Add On-Demand Email Template" link in the upper left corner
- 3) On-Demand Email Template Name - enter the name of template (required)
- 4) On-Demand Email Template Subject - enter the desired email subject line (not required but HIGHLY recommended)
- 5) On-Demand Email Template Type - select the type of email you are sending. Definitions may be found by going to the **Messaging Wiki Ref:** <https://wiki.smartbutton.com/default.asp?W350> then going to "Messaging Template Types."
 - i) Welcome
 - ii) Verification
 - iii) Password Help
 - iv) Reward Certificate
 - v) Coupon Certificate
 - vi) Reward Notification
- 6) On-Demand Email Template Status - available, unchecked; not available checked

Creating Campaign Email Templates

- 1) To create a new Campaign Email Template go to Messaging >> Content >> Campaign Template
- 2) Click on the “Add Campaign Template” link in the upper left corner
- 3) Campaign Template – enter the name of the campaign template (required)
- 4) Campaign Status - available, unchecked; not available checked

Using the HTML Editor



The HTML editor is similar to using a word editor in regard to its formatting options. Copy/paste from an external document is not recommended, however if it is absolutely necessary do so using the HTML tab. There are two ways to create the template using the HTML editor.

Design Tab Image Buttons – Using Design view is the simplest option as it is very similar to word editors. There are two options for using images



Import Image – This option requires copy/paste of URL from Web >> Patron Portal >> Portal Image Library >> edit image



Image Manager – This option allows you to browse the Portal Image Library



Image Map - Once the image has been inserted you can use the image map to create links within the image



Insert Link – Inserts a link within the template



Hyperlink Manager – Inserts a link within the template with additional styling, anchor and email options.



Remove Link – Removes link from template



Insert Code Snippet – This option allows the use of dynamic placeholders within the email. By clicking the drop down arrow you will be able to view a list of available member-specific informational placeholders.

Best Practice: Be mindful of how many placeholders are used. Too many placeholders may increase the load time of the message.

Design Tab Table Buttons – The HTML Editor offers several table creation/editing tools.



Insert Table – Inserts a table with the specified rows and columns.



Insert Row Above – Inserts a table row above the one selected.



Insert Row Below – Inserts a table row below the one selected.



Delete Row – Deletes the selected table row.



Insert Column to the Left – Inserts a table column to the left of the one selected.



Insert Column to the Right – Inserts a table column to the right of the one selected.



Delete Column – Deletes the selected table column.



Merge Cells Vertically – Merges selected table cells vertically.



Merge Cells Horizontally – Merges selected table cells horizontally.



Split Cells Vertically – Splits selected cells vertically.



Split Cells Horizontally – Splits selected cells horizontally.



Delete Cell – Deletes selected cell from the table.



Cell Properties – Shows the properties of the selected cell.



Table Properties – Shows the properties of the table.

HTML tab – The HTML tab requires prior HTML knowledge. If you have experience with and prefer management via HTML code you may do so using the HTML tab. If any copy/paste is to occur from an external application, do it here.

Preview tab – The Preview tab will give you an idea of what the email will look like when sent. In some instances, when using member placeholders, the preview may appear misaligned. This is due to the placeholder name being longer than the provided space, however this does not mean it will appear as such in the final email. The placeholder name will be replaced by the actual data from the database.

Creating On-Demand Text Template

- 1) To create a new On-Demand Text Template go to Messaging >> Content >> On-Demand Text Template
- 2) Click on the “Add On-Demand Text Template” link in the upper left corner
- 3) On-Demand Text Template Name – Enter the name of the text template (required)
- 4) On-Demand Text Template Type – Select the type of text message to be sent. Definitions may be found by going to the **Messaging Wiki Ref:** <https://wiki.smartbutton.com/default.asp?W350> then going to “Messaging Template Types.”
 - i) Welcome
 - ii) Verification
 - iii) Password Help
 - iv) Reward Certificate
 - v) Coupon Certificate
 - vi) Reward Notification
- 5) On-Demand Text Template Status - available, unchecked; not available checked
- 6) Dynamic Placeholders - This option allows the use of dynamic fields within the text message. By clicking the drop down arrow you will be able to view a list of available member information placeholders. Select the desired placeholder then click on the “Add Selected Placeholder to Message” link next to this field. This adds the placeholder to the text message.

Best Practice: Be mindful of how many placeholders are used. Too many placeholders may increase the transmission time per message.

- 7) Message – Enter the desired text message in this field. Any placeholders used will appear in this field as well.

Additional Best Practices

Testing - Make sure you test your Email message in multiple sources (browsers, email clients, mobile providers). To test the message, create one or more test accounts if you do not currently have them. Then create and assign a test club to those accounts. Then send the messages.

Campaign Email Volume – Restrict the number of Emails sent at one time to 100K

Opt-Outs – When selecting the intended recipients of the message, remember to utilize group rules that will prevent members who have opted-out of receiving email/text messages from getting them.

Examples:

- Has Email with Status
- Has Mobile Phone Number with Status
- Do Not Email

Dynamic Placeholders – Dynamic Placeholders are database fields that allow the insertion of member information (name, email address, available points, etc.) in the template.

Examples:

- %MEMBER_FIRST_NAME%
- %EMAIL_TO_ADDR%
- %MEMBER_POINTS_AVAILABLE%

Send in Groups and Intervals – It is recommended that large email/text blasts be broken down into groups of no more than 100K, then sent consecutively, not simultaneously. The best way to set up the groups would be to create child groups using the member group rules Included in Batch Campaign and Did Not Open Batch Cam