Introduction to S-Tags and Conditional Content

Benefits of Dynamic Content

- Fun, interesting, and engaging
  - Change things up based on:
    - Current day
    - Page or section of site you are on
    - Past interactions with the site
    - Biographical information

- Personalized for each viewer
  - Email: "Dear Bob"
  - Web: Members only content

- More successful online engagements
  - Dynamic giving levels

- Coordinate with other marketing efforts
  - Conditionalize content based on info in URL

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Introduction to S(Session) Tags

- Short snippets of code

- Portal to the Convio database
  - Key to displaying user, server information

- Unique to the Convio System

- Easy to use, easy to learn

- Powerful tool

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S Tag Basic Syntax

What we want to see:

- Current URL

S Tag Basic Syntax

Short Hand

- Format: [[S#]]

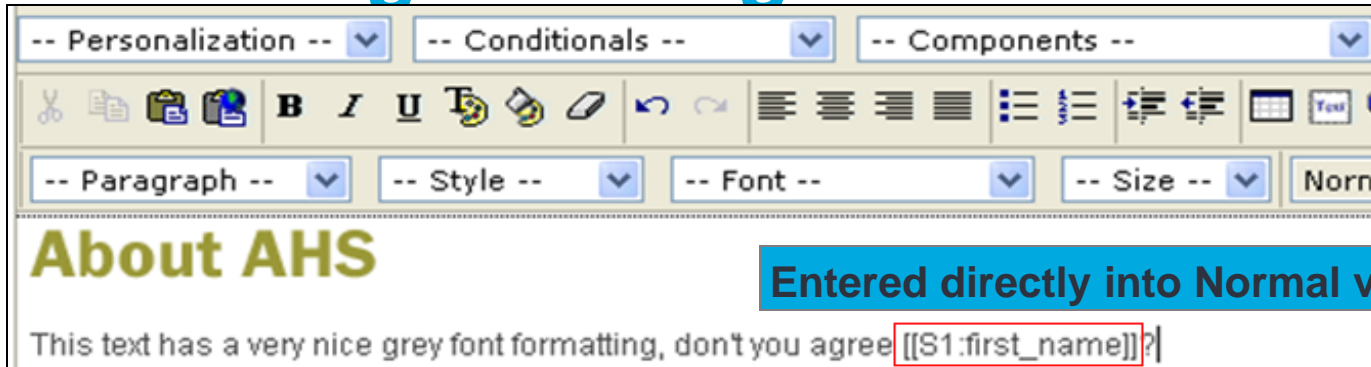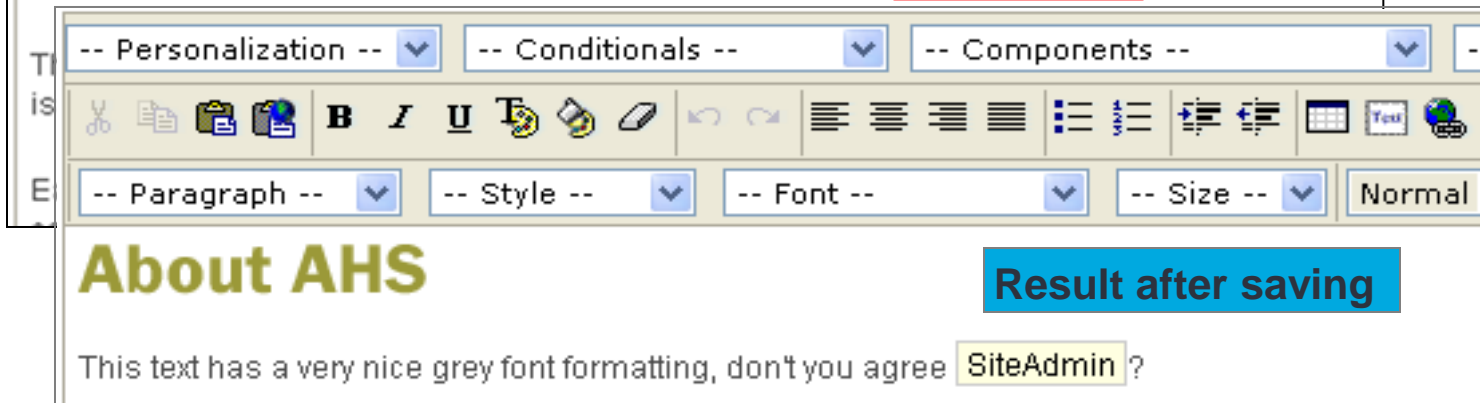XML View (system generated)

- <convio:session title="#" name="#"></convio:session>
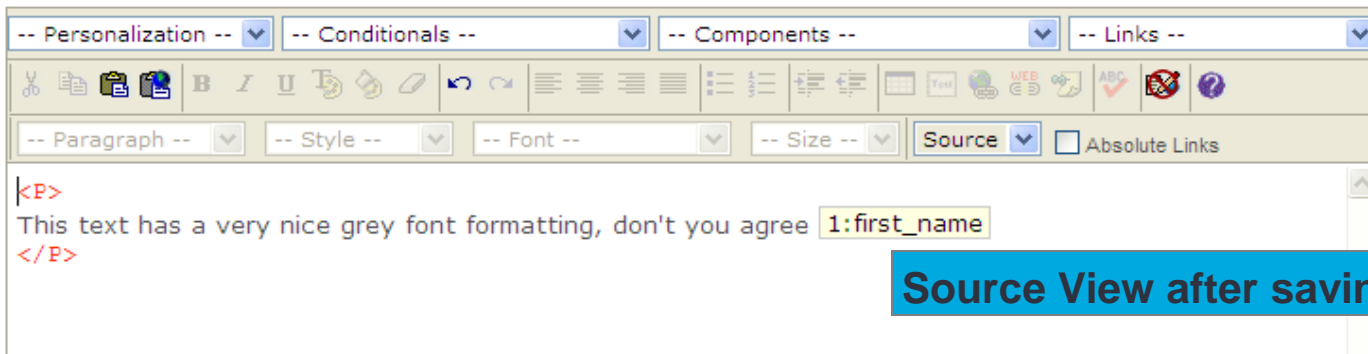
Example:

- Code: [[S8]]
- Renders: http://www.convio.com/site/PageServer?pagename=homepage

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Entering an S Tag

Entered directly into Normal view of WYSIWYG

About AHS

This text has a very nice grey font formatting, don't you agree [[S1:first_name]]?

Result after saving

About AHS

This text has a very nice grey font formatting, don't you agree SiteAdmin ?

Source View after saving

```
<P>
This text has a very nice grey font formatting, don't you agree 1:first_name
</P>
```

S1 Tag with a single parameter

What we want to see:

- First Name Middle Name Last Name

S Tag syntax with 1 parameter

Short Hand

- Format: [[S#:parameter]]

XML View

- <convio:session title="#:parameter" name="#" param="parameter"></convio:session>

Example:

- Code: [[S1:first_name]] [[S1:middle_name]] [[S1:last_name]]
- Renders: Kermit The Frog
- If the information isn't there it will return blank

S Tag with 2 or more parameters

What we want to see:

- President of the US

S Tag with 2 or more parameters

Short Hand

- Format: [[S#:parameter:parameter2:parameter3]]

XML View

- <convio:session title="#:parameter:parameter2:parameter3" name="#" param="parameter:parameter2:parameter3"> </convio:session>

Example:

- Code: [[S93:president:text:name]]
- Renders: George Bush
- On January 20th, 2009 it will render: Barack Obama

S Tags in the wild – the plain

Dear friend,

Call your state senator and tell them to vote green

at the December congressional session!

Already contacted your legislator? Please tell 5

friends about it!

S Tags in the wild – with S Tags

[[S9:cons]]

Dear [[S1:first_name]],

Call your [[S1:stateprov]] senators

[[S93:federal senator:text:phone]] and tell them to

vote green at the December congressional session!

Already contacted your legislator? Please tell 5

friends about it now! [[S5:mfc_full_page]]

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S Tags in the wild – the result

Dear Bob,

Call your TX senators John Cornyn III (202)

224-2934 and Kay Bailey Hutchison (202)

224-5922 and tell them to vote green at the

December congressional session!

Already contacted your legislator? Please tell 5

friends about it now!

Intro to Conditionals

- Logic phrases that tell the system how, when, and under what circumstances to display information.

- Work in conjunction with S Tags

- Unique to the Convio system

- You don't need a programming background to use them
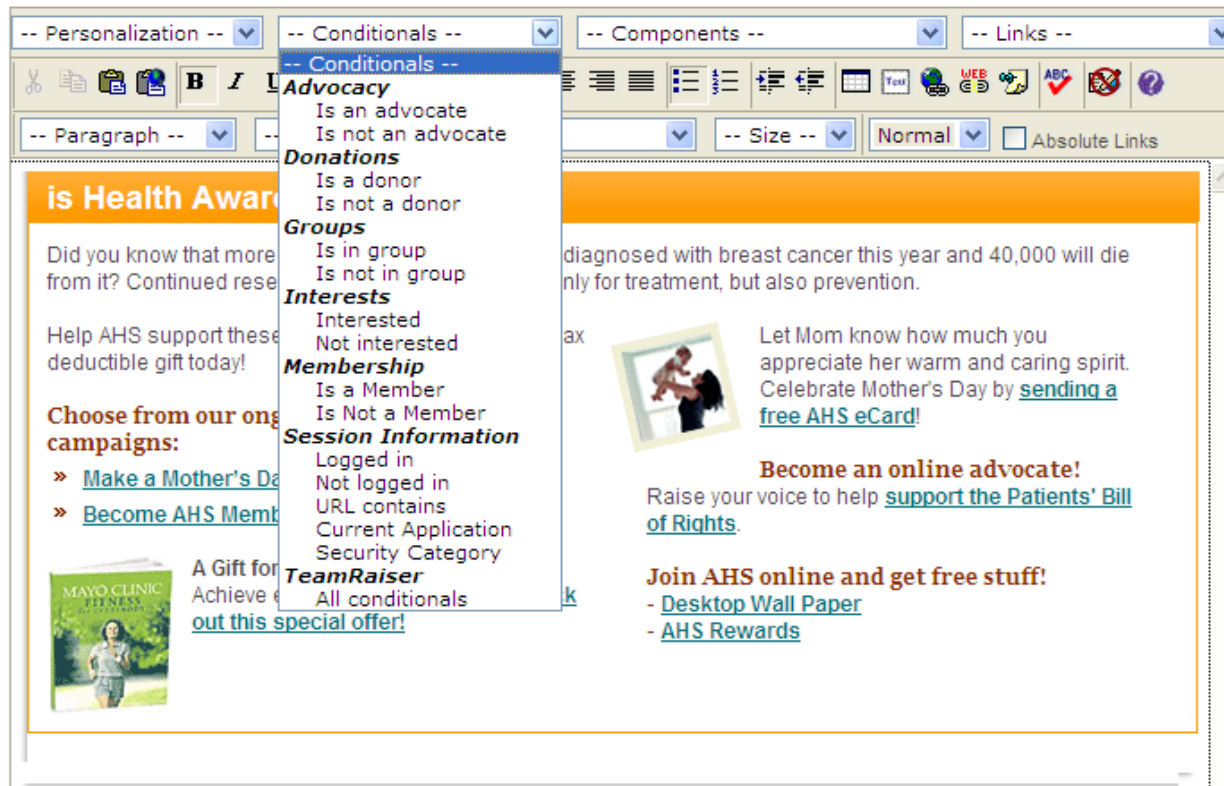
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Conditionals in the WYSIWYG

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282),
  then show member content;
  else, show general content.

  - If   X   =   Y   then   show   A   else   show   B

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282), then show member content; else, show general content.

  - If   X = Y   then   show   A   else   show   B

- [[?

  - Our "If" statement.
  - Indicates the beginning of our conditional.

1

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282),
  then show member content;
  else, show general content.

  - If   X = Y   then   show   A   else   show   B

- [[?[[S45:8282]]

  - "Group" S tag, referring to Group ID 8282.

  - This is the argument that dynamically returns a value.

  - What Convio "sees" is either a TRUE or a FALSE.

1

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282), then show member content; else, show general content.

  - If   X = Y   then   show   A   else   show   B

- [[?[[S45:8282]]::
  - Equals or Contains.

1

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282), then show member content; else, show general content.

  - If   X = Y   then   show   A   else   show   B

- [[?[[S45:8282]]**::**TRUE

  - The value for which we are testing.

1

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282),
  then show member content;
  else, show general content.

  - If X = Y then show A else show B

- [[?[[S45:8282]]**::**TRUE**::**

  - Our "Then" statement.

1

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282),
  then show member content;
  else, show general content.

  - If   X = Y   then   show   A   else   show   B

- [[?[[S45:8282]]**::**TRUE**::**Member Content

  - Content that displays if the argument returns a
    positive match.

2

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282), then show member content; else, show general content.

    - If   X = Y   then   show   A   else   show   B

- [[?[[S45:8282]]::TRUE::Member Content::

    - "Else," or "otherwise."

2

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282),
  then show member content;
  else, show general content.

  - If   X = Y   then   show   A   else   show   B

- [[?[[S45:8282]]**::**TRUE**::**Member Content**::**General
  - Content that is displayed if we found no match.

Anatomy of a Conditional

- If logged-in user is a donor (Group ID 8282),
  then show member content;
  else, show general content.

    - If X = Y then show A else show B

- [[?[[S45:8282]]::TRUE::Member Content::General]]
    - Indicates the end of our conditional.

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How Do We Get There?

- Develop your scenario

- Understand key terms "if," "then," "else"

- Write the conditional code

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Meet Your Constituent

- Bob is from Austin, TX, and is a regular donor to your organization.

(Bob)

- In a few weeks, Bob is going to receive an email from your organization, kicking off a major campaign in Q1 2009.

- We're going to visualize what Bob will see in this campaign, based on his Constituent360 record.

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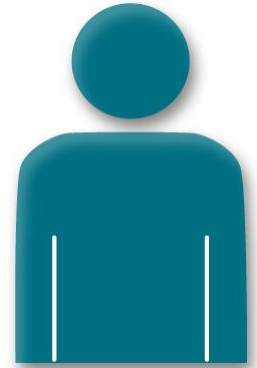
Basic Scenario: Localizing Language

- Texans are particular about how they are addressed.

- 'Round these parts it's "Howdy!" not "Hello".

- The successful nonprofit organization is able to engage Bob (and all other Texans) with this personalized touch.

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Basic Scenario: Localizing Language

- Develop your scenario

  - "In my email to our constituents,
    I want to address Texans with 'Howdy' and
    address everyone else with 'Hello'"

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Basic Scenario: Localizing Language

- Understand key terms "if," "then," "else"

  - **If** logged-in user* is from Texas,
    then address with "Howdy, *first_name*"
    else address with "Hello, *first_name*"

    * Or email recipient

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Basic Scenario: Localizing Language

■ Write the conditional code

> ▶ **[[?**[[S1:home_stateprov]]::TX
> :: Howdy, [[S1:first_name]]
> :: Hello, [[S1:first_name]]]]

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Advanced Scenario: "OR" Conditionals

- On the landing page for this campaign, we want to urge donors of our mid- or end-year campaigns to send an eCard to family and friends.

- These constituents are stored in Constituent360 Group ID 2460 (for the mid-year campaign) and Group ID 3680 (for the end-year campaign).

Advanced Scenario: "OR" Conditionals

- Develop your scenario

  - I want donors from either of our major campaigns this year to be able to send an eCard

  - Each constituent does *not* need to have donated in *both* campaigns

  - For all other constituents, I want to display a link to a different action

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Advanced Scenario: "OR" Conditionals

- Understand key terms "if," "then," "else"

  - **If** logged-in user is a member of Group ID 2460 **OR** Group ID 3680
    then display unique content and eCard link
    else display link to donation form

3

Advanced Scenario: "OR" Conditionals

- Write the conditional code:

  [[?[[S45:2460]]::TRUE::T::]]
  [[?[[S45:3680]]::TRUE::T::]]

  Tip:
  The "T" is used as shorthand to "group" positive matches in the two conditionals

  Note that we are outputting *nothing* if the group returns anything other than TRUE.

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Advanced Scenario: "OR" Conditionals

- Write the conditional code:

  [[?

  [[?[[S45:2460]]::TRUE::T::]]

  [[?[[S45:3680]]::TRUE::T::]]

  ::T::

  Send an eCard!

  ::

  Donate now!

  ]]

3

Advanced Scenario: "OR" Conditionals

- Assume Bob is a donor of both campaigns:

[[?

T

T

::T::

Send an eCard!

::

Donate now!

]]

<table>
<tr><td>Reminder:
Always think about what Convio "sees" when outputting an S tag or nested conditional.</td></tr>
</table>

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Advanced Scenario: Nested Conditionals

- After our constituents send an eCard or donate, we want to provide a volunteer opportunity on the "thank you" page.

- There's a special event occurring in Austin, TX! Let's show the locals a volunteer opportunity.

- If the person viewing the page isn't from Austin, TX, we'll display a link to the volunteer landing page.

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Advanced Scenario: Nested Conditionals

- Develop your scenario

  - I want residents of Austin, TX to see a local volunteer opportunity.

  - All other constituents view a general listing of events.

  - There are at least six other cities named "Austin" in the United States, so we need to ensure that the logged-in user is a Texas resident.

Advanced Scenario: Nested Conditionals

- Understand key terms "if," "then," "else"

  - **If** logged-in user is a resident of Texas
        AND a resident of Austin
    then display local event
    else display general listing

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Advanced Scenario: Nested Conditionals

■ Write the conditional code

▶ **[[?**[[S1:home_stateprov]]::TX

::

Test for Austin

:: General Listing]]

3

Advanced Scenario: Nested Conditionals

■ Write the conditional code

   ▶ **[[?**[[S1:home_stateprov]]**::**TX

      :: **[[?**[[S1:home_city]]**::**Austin

         :: Local Event

         :: **]]**

    :: General Listing]]

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Advanced Scenario: Nested Conditionals

■ Write the conditional code

> **[[?**[[S1:home_stateprov]]::TX
  :: **[[?**[[S1:home_city]]::Austin
    :: Local Event
    :: **Texas Events**]]
:: General Listing]]

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CONTAINS not EQUALS

- Convio conditionals rely on usage of **contains**, not **equals**

- Attempting to match for **Bob** will also return a positive match for **Bobby** and **Bobb-O**

- **How do we solve this?**

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Using Delimiters

- A delimiter is a character that marks the beginning or the end of a piece of data.

- In other words, we isolate what we want to match by building a wall around it:

 Austin

- We often use the letters "x" or "z" as our delimiters due to their infrequent appearance in everyday names, locations, etc.

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Using Delimiters: A Basic Example

- We can test against a logged-in user's first name with the following code:

  [[?[[S1:first_name]]::Bob::Howdy, Bob!::]]

- We don't want to return a false positive on people named Bob-O-Rama or Bob-O (or perhaps a simple "Bobby")!

- Bob becomes xBobx and [[S1:first_name]] becomes x[[S1:first_name]]x

- The conditional then becomes

  [[?x[[S1:first_name]]x::xBobx::Howdy, Bob!::]]

Delimiters: Where Are They Useful?

- S1 for logged in/out
  - [[?x[[S1:user_name]]x::xx

    ::You are not logged in
    ::You are logged in]]

  - If a user is not logged in, [[S1:user_name]] will render blank, causing the Xs to collapse together.

  - The key to remembering this is keeping in mind what the Convio software "sees" as the S tag is rendered.

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Review

- S Tags and Conditionals are the basis for building stronger relationships with your constituents by making your sites more personalized, fun, interesting and innovative.

- S Tags key to displaying information

- Conditionals are the key to dynamic content

- Easy to use, easy to learn

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More Resources

- Check out more of our free resources or connect with us in the following places:

- www.convio.com/service_modules

- www.convio.com/free_kits

- www.convio.com/communitywebinars

- www.convio.com/community

- @ConvioHelp on Twitter

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