Overview
The WYSIWYG editor allows you to create dynamic web pages that may contain formatted text, images, links, and more. You can paste in content from another application, add personalization, direct your page to a specific audience, embed a survey, insert a link to a news article, and much, much more. For those who are comfortable with HTML coding, you can also view the actual HTML code at any time and make modifications directly to the code. You can even insert Flash content into your page using the code window of the WYSIWYG editor.

The same WYSIWYG editor that is used in PageBuilder is also used for composing email, writing an on-screen thank you message within Convio Advocacy, composing a StoryBuilder article, or simply creating stationery—although the available options may vary depending on the application in use. For the most part, the WYSIWYG editor is true to its name: what you see (in the window of the editor) is what you get (on your web page or email).

Objectives

<table>
<thead>
<tr>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>By the end of this section, you will be able to…</td>
</tr>
<tr>
<td>☐ Add an image and document to the Image and Document Libraries</td>
</tr>
<tr>
<td>☐ Create and format content including inserting pictures, creating tables, adding links and embedding components</td>
</tr>
<tr>
<td>☐ Create basic personalized and conditionalized content</td>
</tr>
<tr>
<td>☐ Create and format content for an eNewsletter</td>
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</tbody>
</table>
EXERCISE 2.1: View a Diagram of WYSIWYG Components

View and Discuss Various WYSIWYG Components

1. In the top left corner of the AHS homepage, click the link that reads “View WYSIWYG Components”.
2. Discuss the use of multiple elements from Constituent360 in creating content.
What is WYSIWYG?

- What You See Is What You Get
- Content editor used throughout Convio for creating web content and email messages
- Allows for creation of personalized and conditionalized content
Library

The Library contains elements that we will embed in our content such as images, or link to, such as a document. The Image Library and Document Library can be found in the Library dropdown menu.

Image Library

The image library is part of your Convio-hosted content. Add photos, logos, banners and other images here to easily use them in your email and web content. You may add any .jpg or .gif files; other file types are not supported.

Images that you will embed in web content or emails will be stored in the Image Library

Only JPEG and GIF images can be uploaded
Document Library

The document library contains other types of files that you may want to link to from your web and email content. These can include documents, spreadsheets, PDF files, audio and video. Be sure to check that the file type is supported by Convio by reviewing the list in the Document Type drop-down menu.
Document Library Version Management

Once you upload a document to the Library, you can add updated versions without having to change where the document link is pointing. The link will always point to the active version. This is very similar to the way you will manage page versions in PageBuilder.

Version Management

Upload and store multiple versions (one active at a time)

Active version

Click to activate this version
EXERCISE 2.2: Uploading Library Elements

Upload an Image into the Image Library
3. Select Image Library from the Library dropdown menu
4. Click Browse next to the “File Name” field
5. Find and select an image from your PC to upload and click Open
6. Insert a “Graphic Title” and “Search Keywords” and click Save

Upload a Document into the Document Library
1. Select Document Library from the Library dropdown menu
2. Enter the “Document Title,” “Description,” and “Keywords” in the appropriate fields
3. Select the “Document Type” (make sure it matches with the document you are uploading)
4. Click Browse next to the “File Name” field
5. Find and select the “Upload Me” document from your PC and click Open
6. Click Upload

Create a New Version of the Uploaded Document
1. Search for the “Upload Me” document from the “Search” field in the document list
2. Click on the document name
3. Change the “Document Title” to [Link to Me]
4. Click Save
5. Click on the Create a new version
6. Enter [v2-added-contact-info] in “Version Name” field
7. Enter [Added new address and contact info] in “Description” field
8. Find and select the “Upload Me New Version” document from your PC and click Open
9. Click Upload
Using the WYSIWYG editor, you can personalize content, conditionalize content to show to constituents meeting certain criteria, insert components such as images or surveys, and insert links to other Convio applications or external urls.
Inserting an Image

Select Image from Components dropdown menu

Search for image and click Insert

Align to left or right to allow text to wrap around image

Creating a Table

Align table contents to top of table

Select number of rows and columns
Modifying a Table using HTML

Because the WYSIWYG editor was created for ease of use and not advanced editing, you may run into some limitations when trying to format content. You can easily switch to the HTML “Source” view by clicking the dropdown menu in the toolbar or the “Source” button at the bottom of the WYSIWYG.

**Note:** If you are the content creator/editor for your organization, you will benefit from taking a basic HTML class. This will help you more easily identify and troubleshoot formatting issues you may run into.
Creating Links

Linking to Convio Elements

Highlight text to be linked

Select destination from Links dropdown menu

Click Insert
Special Link Options

Select Options instead of Insert

Create an auto-login link

Add interest to user profile

Add source or subsource codes

Creating External Links

Highlight text

Select link icon

Insert destination
Anchor Links

- **What is an anchor link?** A link, generally at the top of a page, that takes the user to a section further down the same page to avoid having to scroll.
  - Example: A “Frequently Asked Questions” page
Inserting an Anchor Link

First, put cursor where the link will take the user.

Next, click anchor icon in toolbar and enter a keyword for the link.

Highlight text to be linked.

Select link icon in toolbar.

Select target from Anchor dropdown.
Embedding a Survey Component

Select Survey from Components dropdown

Select Insert

Survey component successfully embedded
Special Concerns: Pasting Text into WYSIWYG

- Always drop copied text into Notepad before pasting in WYSIWYG

Sometimes you may not create your pages from scratch in the Convio WYSIWYG. You might have content you've created in a Microsoft Word document, another word processing program, or perhaps a coworker sent you content in an email. You can easily copy and paste this content into the Convio WYSIWYG, as long as you paste the text into Notepad first. This will strip any hidden formatting and give you clean text with which to work. Copy the Notepad text, then paste into the WYSIWYG.
EXERCISE 2.3: Inserting Links & Components

Create a Quick Email to Access the WYSIWYG
1. Log in to the admin side of your Convio powered site
2. Select Quick Email from the Email dropdown menu
3. Click the Create a New Message button
4. Enter your name in the “Enter a name for this message” box
5. Click Next
6. Again, enter your name in the “Enter the sender’s name” box
7. Enter [devnull+123456@convio.com] as the sender’s email address
8. Enter [WYSIWYG] as the subject
9. Click Next
10. Select the “Blank Stationery” radio button
11. Click Next

Insert an Image
1. From the WYSIWYG toolbar, select the Components dropdown menu
2. Find and select Image
3. Search for image in “Search” field and click Insert
4. Align image to the left or right with the “Alignment” dropdown menu
   (Note: Aligning an image to the left or right will allow text to wrap around the image)

Create a Table
1. From the WYSIWYG toolbar, select the table icon
2. Under the “Cell Properties” section, select Top in the “Vertical Alignment” dropdown menu
4. Click OK

Create a Link to a Convio Element
1. In the WYSIWYG, type [This is a link to a document]
2. Highlight the text
3. Click the Links dropdown menu and select Document Library
4. Search for the “Link to Me” document in the “Search” field
5. Click Insert

Create a Link to an External URL
1. In the WYSIWYG, type [This is a link to Google]
2. Highlight the text
3. Click the links icon in the toolbar
4. In the “URL” field, type [www.google.com]
5. Click OK

Embed a Survey Component
1. In the WYSIWYG, click the Components dropdown menu and select Survey
2. Find your own “Embed Me” survey from the last section
3. Click Insert

Extras for Experts
1. Use source and sub-source components in your links
Overview: Personalization and Conditionalization

Personalized and conditionalized communications motivate constituents.

**How eCRM Works**

- Attract constituents to your Web site through “well” marketing, integrated marketing campaigns, and by encouraging registration.
- Build enduring relationships (grow support levels and frequency while increasing retention rates) by analyzing constituent data and refining your approach.
- Understand constituent interests and motivations. Engage them with regular, personalized communications through your Web site and email.
- Prompt response and provide convenient online tools to enable support (donations, advocacy, volunteering, and more).

Personalized communications motivate constituents by speaking to them directly.

## Personalization

**Overview: Personalization**

- Vary content based on specific field values in someone’s Constituent360 profile

- Ex: use a personalized **first name** field in a newsletter greeting:
  - Mary sees “Dear Mary,”
  - John sees “Dear John,”
  - A recipient w/no first name in profile sees “Dear Friend,”
Example: Personalization

More Examples

- Making a specific appeal
  - You can make a difference, Mary, in the lives of....

- Acknowledgement of a recent donation
  - Thank you for your donation of $100!

- Status of membership
  - Your Gold Membership is good through October.

- Confirmation of contact information
  - Our records indicate your current address is 123 Main St.

- Role-based event updates
  - You are registered as a Power Walker for this event.
Basic Personalization

Select First Name from Personalization dropdown menu

Enter text to be used if record does not have a first name

Successfully inserted a First Name Personalization

Personalization allows you to vary content based on a value in constituent profiles. For example, when you send an email to thousands of registered users, each one sees that greeting with his or her own name.

Here is another example of a basic personalization:
Conditionalization

Overview: Conditionalization

- Vary content based on certain attributes in someone’s Constituent360 profile

- Ex: show content “A” to someone who has donated, and show content “B” to someone who has not

Another way to motivate constituents is through the use of conditionals. Conditionals, again, allow us to speak directly to constituents based on their online activity.
Example: Conditional Content

The web page below contains a paragraph conditional based on the registered user’s donation history.

Donor view:
Jennifer is thanked, given an update on the building project, and invited to the Grand Opening.

Non-donor view:
Margaret is educated about the building project and asked for a contribution.

Here is one example of how conditional content works. The two screenshots show the exact same section of a given web page, but one paragraph looks different depending on who is viewing it. The paragraph here has been conditionalized based on a constituent’s donation history. A donor will be thanked for her generosity and invited to the grand opening of a new building. Someone who has not yet donated will get information about the building project and be invited to donate.
Example: Conditional Content
This content varies depending on the viewer’s registration and login status

The logged-in visitor is welcomed by name and linked to online benefits.

PARTICIPATE
Welcome Jennief, You have full access to our online realtime programming guide, so be sure to keep up with what’s playing!

The anonymous website visitor is encouraged to register or log in.

PARTICIPATE
Registered users can search our online realtime programming guide. Already registered? Log in now to get immediate access! (If you don’t know your username/password, we can send those login to the email address we have on file.)

Here’s another example. This time the conditional is based on whether the viewer is logged in. The logged in person will be welcomed by name and linked to certain member benefits. Anyone not logged in sees a description of online benefits and is encouraged to log in or register. Note: A returning visitor may be logged in automatically via a cookie stored on his or her machine.
Types of Conditional Content

- **Donor status**: whether the constituent has a “donor” flag (automatically set for online donations through the integrated Convio fundraising tools)

- **Advocate status**: whether the constituent has an “advocate” flag (automatically set for action alert responses through the integrated Convio advocacy tools)

- **Logged in**: whether the website visitor is logged in or not

- **Interests**: whether the constituent has self-selected a particular topic as an email or website interest

- **Groups**: whether the constituent is flagged with membership in a specified Constituent360 group
  - Ex: only allow volunteers to view an online Volunteer Center webpage, best practice is to conditionalize the invitation and link to the page

- **TeamRaiser**: various conditionals such as “Is team captain,” or “Amount raised”
Basic Conditionalization

Highlight text to be conditionalized and select a conditional from the dropdown menu.

Right click on conditional box to see or edit other cases.

Note: “Donor” and “Not a donor” cases both refer to a logged in constituent in your C360 database. An Unknown case would be for a user who is not logged in. The same hold true for other conditionals as well.

Select Not a donor from the menu and enter text in the white box.

Select Show All Cases to see all text for this conditional.
EXERCISE 2.4: Creating Personalized and Conditionalized Content

Create Basic Personalized Content
1. In the WYSIWYG, type [Dear ]
2. From the Personalization dropdown menu select First Name
3. In the “Script Prompt” field type [Supporter]
4. Click OK

Create Basic Conditionalized Content
1. In the WYSIWYG, type [This sentence will only be seen by Board Members]
2. Highlight the text
3. From the Conditionals dropdown menu, select Is in group
4. Search for the “Board Members” group in the “Search” field
5. Click Select next to the “Board Members” group
6. Click Save

Extra for Experts
1. Nest a conditional within a conditional and have it call a reusable page if both conditions are met
Putting it All Together

You have seen in this section how various elements can be included in your web and email content. You will now take those elements and put them into real-world practice by creating and formatting your own eNewsletter.
EXERCISE 2.5: Creating and Formatting an eNewsletter

Create a Table as the Base for Your eNewsletter
1. Select everything in your current WYSIWYG window
2. Hit the Delete button on your keyboard
3. Select the table icon from the toolbar
4. Under "Table Properties" set "Width" to [593]
5. Under "Rows and Columns" set Rows to [1]
6. Click OK
7. Using what we've learned, click “Source” view to begin editing the HTML
8. Set the first column width to 66%
9. Set the second column’s background color to #f8f8f8
10. Switch back to “Normal” view to make sure the changes were made
11. Click Save and continue to the next section of the exercise

Use the Provided Models to Create and Format the Content
1. Use the models at the end of this section as a guide to creating and formatting your content
2. Save often
3. Images are stored in the Image Library
4. Content text is stored in the “Training Toolkit” folder on your desktop
5. Ask instructor for assistance as needed

Copy Finished HTML, Paste in Notepad and Save
1. Once you have completed your eNewsletter content, switch to “Source” view in the toolbar
2. Highlight everything in the editor and click Ctrl+C to copy
3. Open Notepad and paste HTML by clicking Ctrl+V
4. Save the file as [Your name’s eNewsletter] to your desktop
Use the following four pages to construct the above eNewsletter.
Images

- wysiwyg_race.gif
- wysiwyg_elderCare.gif
- wysiwyg_drugs.gif
- wysiwyg_store.gif
- wysiwyg_spacer_narrow.gif
- wysiwyg_spacer_wide.gif
- wysiwygCitibank.gif
- wysiwygDell.gif
Best Practices

Lead story teaser with link to full story

Dear [Name],

It’s that time of year again! We’re gearing up for the 4th annual Steps to Recovery 5K Fun Run, and you can get a head start by signing up today. Last year you raised $25 to help people recovering from alcohol and drug addiction and this year, we know you can beat that record!

Last year over 2,000 people participated in the event. Visit the AHS store for your free t-shirt and coffee mug to wear on race day while you run.

Alex, because you are a returning participant, we’ve got a special offer for you. If you sign up by September 30, 2003, we’ll throw in a free t-shirt and coffee mug!

Find Out More

Are You Prepared for Elder Care?

A new study funded in part by the American Health Society has found that 7 in 10 Americans with parents over 65 have not considered what they might do if confronted with the sudden need to provide care for sick or elderly parents.

Find Out More

Separators help visually organize

Congressional Deciding Your Drug Coverage

House Resolution 1179 is being negotiated on Capitol Hill right now. Make sure your representative is standing up for your best interests. Read more to find out about this landmark legislation.

Act now! Find Out More

Current contact info with link to update

Sent to:
Alex, Olkier
Aoliver@gmail.com
1212 Maple St. Austin, TX 7872
512-652-3600

If this information is not correct, please update your profile so that we may stay in touch with you.

Visit the AHS Store

Did you know you can purchase healthcare equipment and gift AHS gear and benefit AHS at the same time?

Buy now!

Uniform image formatting and size

Side bar creates additional real estate

Links that lead to many different actions