

# Tips And Tricks

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# How to Disable/Enable a Message

The Enabled/Disabled status allows you to place messages that you are no longer using in the background (Disabled) or return them to normal view (Enabled).

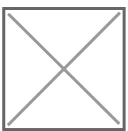
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## 1. Disable/Enable a Message

Disable/Enable a Message

- Click on this icon to INSTANTLY change the status of a message to Enabled/Disabled.
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## 2. OPTIONAL: Change the Enabled status in the Message Details



- **note:** Navigate to the **Email messages** screen and in the **Details** pane, you will find the option to change the Enabled Status. Click **Save** once finished.

# How to use the Template Editor

The template editor provides an array of tools to help edit your template right in Connect. The template editor also provides all the necessary functions to create an email template from scratch although this requires a bit more expertise on your part.

## Editing Text



Editing text with the template editor is easy and provides a lot of the same functionality as any word processor software. Here are the functions you can perform when editing your template copy.

1. **Paragraph Editing** - Change the paragraph style, font or font size
2. **Text Decoration** - Highlight text and choose bold, italic, underline, or strike-through
3. **Alignment** - Align the text left, center or right
4. **Colour** - Change the colour of your font or the background colour
5. **Lists** - Create a bullet or numbered list

## Link Management



The template editor makes link management simple. You can apply a link in seconds by highlighting the text or clicking the image you wish to link, clicking the Insert Link button and pasting in the URL. (UMPIRE will automatically track clicks on your links.)

1.**Link Insertion/Removal** - Buttons for inserting/removing a link into the text/image you have selected

2.**URL** - Text box where you will paste the URL you wish to link to

3.**Target** - Choose from the drop-down list where the link will point to. For email, choose "New Window" to ensure the link operates properly within the Webmail client or desktop email client.

4.**All Properties** - Provides extra functions such as anchor links and email address links.

# Image Management



The image management system that CONNECT provides, allows the user to not only host their images within the tool, but place them in any template they see fit.

1. **Image Insertion** - The Insert Image button allows you to insert an image where you have placed the cursor in the template editor or change an image you already have selected.
2. **Image Selection** - The pop up that appears when you have decided to insert an image, will display all of the available images you have stored in your Image Library.
3. **Insert Image** - Once you have made the selection of which image you would like to insert, you simply click the Insert Image button and the image you selected will appear in your template.

# How to Upload and Insert an Image

If you are looking to use images in your templates and messages, the image library provides a place to host your images and the Template editor allows you to easily access and insert them.

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1. First the image must be uploaded to the system. To do this, click “Upload Image” in the Image library



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2. Fill out the Name and Alternative Text and Select the image file you wish to upload.



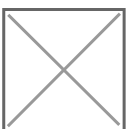
- Tip:
    - The alternative text will be the text that appears when images are disabled in email clients.
    - Be sure to be descriptive or use the text within the image if it applies.
    - Click “Upload Image” once you are finished.
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3. The next step requires you to be in the template or message you wish to place the image within.

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4. Select the Area you wish to Place the Image In



- **Tip:** If you're having trouble finding the "cell" in which to place the images, make sure the "Show Borders" setting is enabled.
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## 5. Select the Image you wish to Place in the Selected Area

- Click on the small icon with "landscape" image on it. (See image below)



- This will open a small toolbar of images that could be potentially inserted in the selected area.



- Click the desired image (it will be highlighted), this enables the insert image button.
- Click on the insert image button and the new image will be inserted in the selected area of message.

- **Tip** hover over the small icons above the editing canvas area, a small hover drop down will display the name of the editing tool.

Select the image you wish to place in the selected area

- **Tip:** If you're having trouble finding the "cell" in which to place the images, make sure the "Show Borders" setting is enabled.

# How to Duplicate a Message/Template

Duplicating a message or template is a great way to save time and effort in CONNECT. This tutorial will show you the simple steps in doing this.

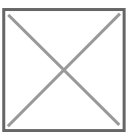
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## 1. Navigate to the Message/Template you would like to Duplicate

Navigate to the Message/Template you would like to duplicate

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## 2. Click the “Save As” button located above the Template Editor





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3. Provide a new message/template name and click **Save As** .

Provide a new message/template name and click **Save As** .

# How to Change Background Colors of a Message or Template

Whether you're looking to add some fresh color to your template or wish to change colors of the default templates to match your brand, this tutorial will help you change both the background color of specific areas of your message or the entire message.

- **Alert:** This tutorial only applies to emails built using tables (For an example, take a look at one of the default templates located in the Email Templates section of your CONNECT community.)
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1. Place your cursor or click anywhere in the area you wish to change. Click on "Cell Properties" which should appear at the bottom of the editor.

Place your cursor or click anywhere in the area you wish to change. Click on

- **Note:** If the "Cell Properties" option does not appear, try clicking in another section of the area until it does.
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## 2. Click on the Table Properties tab

Click on the Table Properties tab

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## 3. Click on the Background Color option and select a color. Click OK when finished.

Click on the Background Color option and select a color. Click OK when finished.

- **Tip:** If you have a custom color you would like to use, make sure to have the "Hex" color code (ie. #FFFFFF = White).
  - Then in the color selector, choose "Add Custom Color" and enter the code.
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## 4. Changing the Background Color of the Entire Message

Changing the background color of the entire message

- This requires you to switch to the HTML mode in the Template editor.
- Locate the tag within your message. To set the background color add in bgcolor="COLOR" inside the tag, so that it looks like this: <body bgcolor="black"> or <body

bgcolor="#FFFFFF">

# How to Insert an Anchor Tag on IE8

Currently, the insertion of Anchor Tags in email templates using IE8 requires a few extra steps due to comparability issues.

Provided, are steps to help guide you through this process.

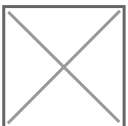
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1. In the message you wish to insert the Anchor Tag, highlight the text at the point at which you would like the Anchor to scroll to



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2. Click the Insert Link button



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3. In the popup, ignore all fields and simply click "OK"



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4. Place the cursor within the linked area and click on the "Hyperlink Manager" button in the bottom right corner.



- **Alert:** Do not highlight the text
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## 5. Click the "Anchor" Tab



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## 6. Type in a name for the Anchor Point. Click "OK"



- **Alert:** Do not use spaces in the name. You may use underscores ( \_ ) to replace spaces.

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## 7. Highlight the text that will be the link triggers the scroll to the Anchor Point



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8. Click the Insert Link button



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9. In the popup, ignore all fields and simply click "OK"



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10. Put the text cursor within the linked area and click on the "Hyperlink Manager" button in the bottom right corner





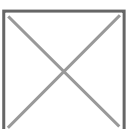
- You will see the text you highlighted become a link.
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## 11. Select the Anchor Point Name that you created earlier



- In the pop up, click the "Existing Anchor" drop down.
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## 12. The URL will change to the Anchor Point name with a # in front of it. Click OK once finished.



13. Click Save once all editing has been completed



# Automatic Web Versions

One of the most common items in an HTML email message is the "Online" or web version.

This version is generally a copy of your HTML email, hosted online so that if a customer has trouble viewing your email, they can click on the web version link and view the email in their browser instead.

It is best practice to place this link at the top of your email so it's easy to access.

CONNECT has a feature that by placing a specific tag as the URL of your web version link, you can trigger CONNECT to automatically create a web version and place a URL back into your email at the time of deployment.

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## 1. The URL tag



- To have CONNECT automatically create web versions for you at the time of deployment, you must use the special variable `##webversionurl##` as the URL (see example on left).
- If you are coding the message yourself, you can use this variable as the "href" as seen in the example to the left.

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## 2. Removing the web version link from the web version



- A common request for web versions is to remove the web version link, from the web version.
- CONNECT has a specific HTML tag that it uses to detect what HTML code to remove when creating the web version.
- Any code placed between the tag will be completely removed from the web version (see example on left).
- This step requires some HTML knowledge and if you are having any trouble with this part, please contact CONNECT Support for aid.