­Setup

How to copy the Signup link to your templates

Here is the Signup link:

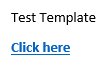
**Click here**

*How to copy the Signup link to your templates:*

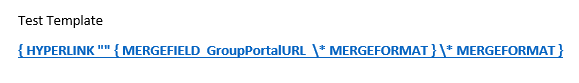
1. Highlight the link above:



1. Click on **Ctrl C** to copy the link
2. Go to the spot where you want it on the template you are copying to
3. Click on **Ctrl V** to paste link there



1. To test the link:
   1. Hold the **Alt** key and press the **F9** key
   2. If everything is correct, it should look like below:



1. **If you want to change the text of the link:**
   1. Let’s say the desired text is “Go to the Online Link”



* 1. Click before the last ‘e’ in here and delete up to the ‘C’ in click



* 1. Then enter the desired text after the ‘C’

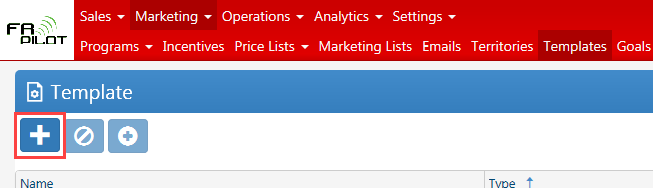


* 1. Click after the ‘C’ and backspace to delete it
  2. Click before the last ‘e’ and hit the delete key to delete forward

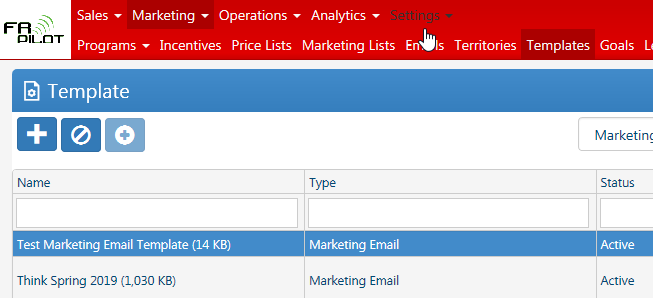


* 1. Hint:
     1. Ctrl Z will undo the last change, so if the link suddenly breaks you can sometimes bring it back via the undo function

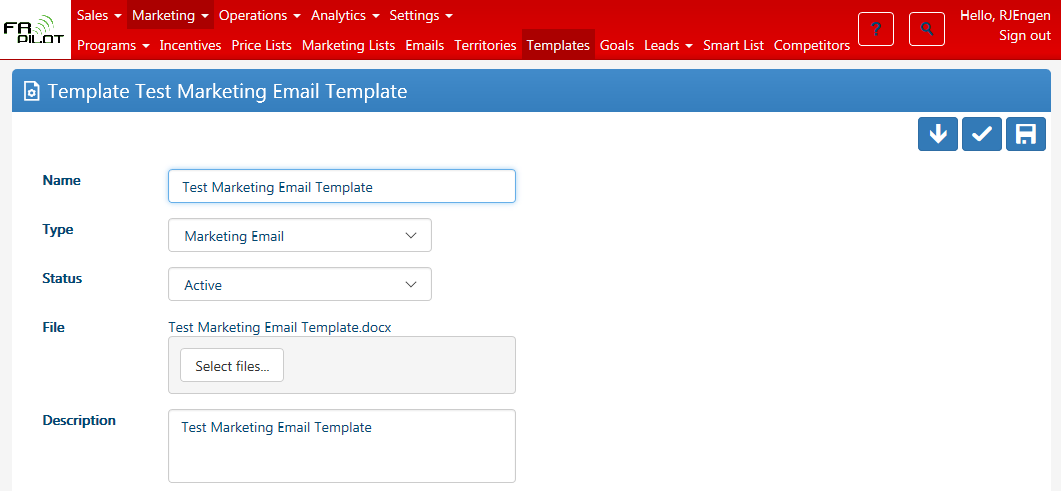
1. **Save** your Template document
2. Is the template in Marketing Templates in My Fundraising Place?
   1. ***No***
      1. Add to Marketing Templates



* + - 1. Enter in Name and Description
      2. Make sure the correct Template Type is selected
      3. Click on the **Select Files** button and select the template file
      4. Click on the **OK** button
  1. ***Yes***
     1. Upload the new template
        1. Double-click on appropriate template

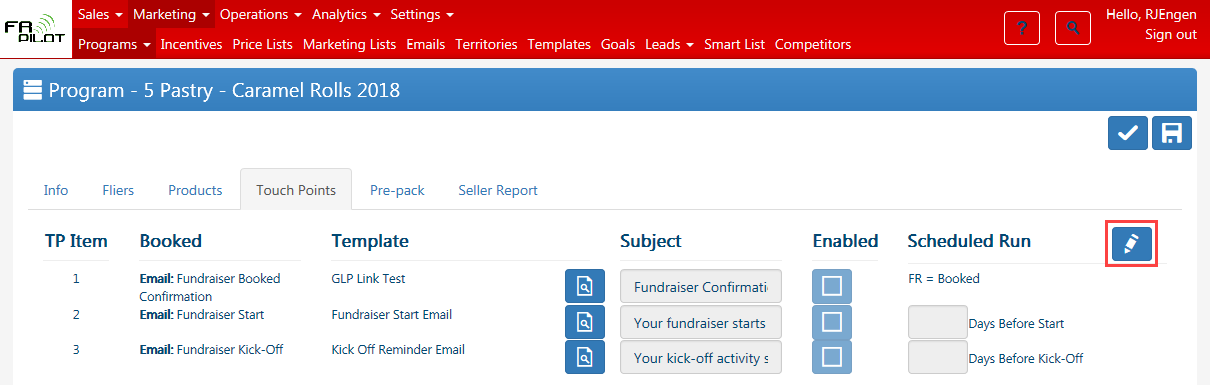


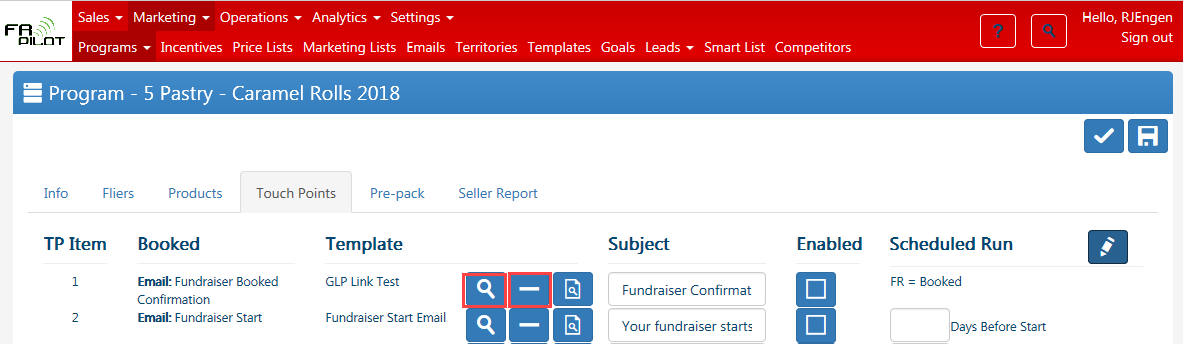
* + - 1. Click on the **Select Files** button and select the template file

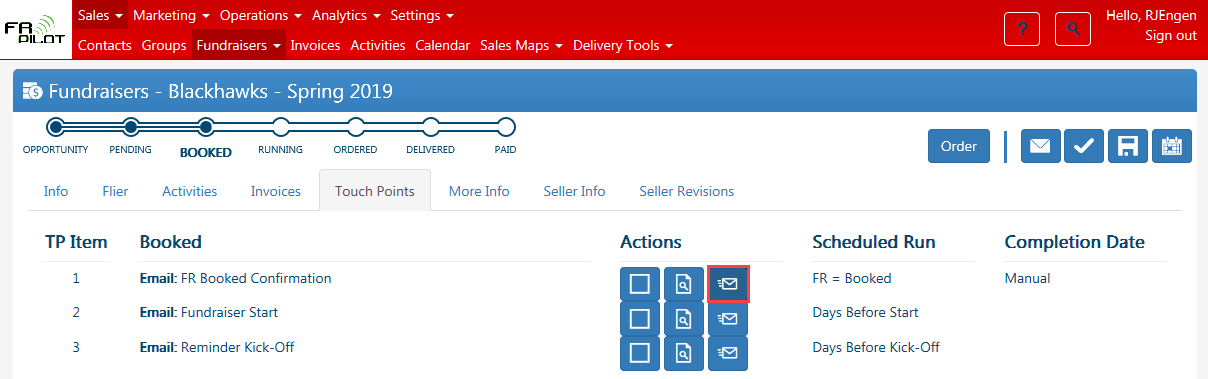


* + - 1. Click on the **OK** button
      2. Click on the **Save & Close** button

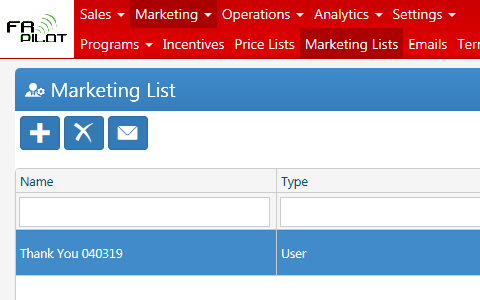
1. **My Fundraising Place Testing**
   1. **Touchpoint documents**
      1. Thank You & Follow-up Touchpoints typically are used with this link
      2. If the Touchpoint Template is not associated with the correct Marketing Program:
         1. Click on the **Edit** **Touchpoints** button



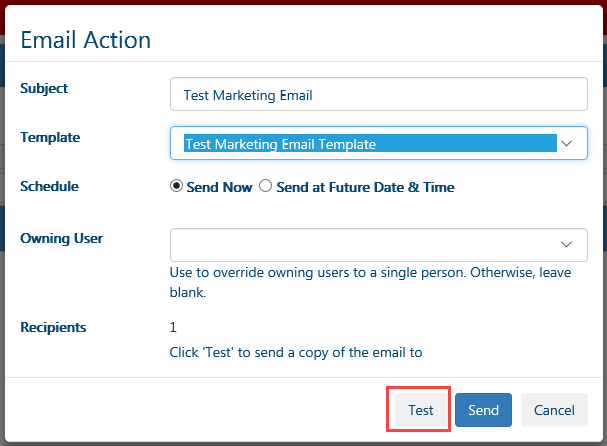
* + - 1. Click on **Delete Template from Program** button
      2. Click on **Add New Template to Program** button and select appropriate template
      3. 
      4. Click on **Save & Close** button
    1. ***Test Touchpoint Template***
       1. Go to Sales > Fundraisers > Touch Points Tab



* + - 1. Click on the **Resend** button for the appropriate Touch Point
      2. Remove the email address in the email – to eliminate the chance of accidentally sending
      3. Click on the Link in the email to verify that it is working
      4. Note: The **Preview** button that creates a Word Document does not work to test the link
  1. **Marketing Email**
     1. **2 Ways of Testing**
        1. ***Send a Test Marketing Email to the Test Marketing List***
           1. Create a Testing Contact (your email)
           2. Create a Testing Group (your email)
           3. Create a Testing Marketing List that only includes the Test Group
           4. Send a Test Marketing Email using the Test Marketing Email Template (which includes the link) to the Test Marketing List
           5. Verify that the link is working correctly
        2. ***Inline Test***
           1. Highlight **Test Marketing List** to email to



* + - * 1. Click on **Create Email Action** button



Enter Subject Line

Choose **Test Marketing Email Template** from dropdown

Choose **Send Now** or **Send at Future Date & Time**

Click on **Test** button

Will send email to the Users Primary Email Address in My Fundraising Place