­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