## Digital Marketing Form 1 spec sheet - Tech Notes

Friday, March 18, 2016 12:25 PM

Although the Digital Marketing Form template was initially built for the "fixed" template layout specification in mind as described within "Digital Marketing Form 1 spec sheet - Worksheet Notes", the form backend itself is capable of rendering variety of content types that are otherwise not advertised for use with the original spec / layout for the sake of streamlining the donation form creation for those non-technical stakeholders.

Here are some varieties of the same template rendering different custom contents to give you ideas different possibilities that you can achieve within the same template should the need arises

- https://donations.diabetes.org/site/Donation2?df\_id=18584&mfc\_pref=T& 18584.donation=form1&testmode=y (same template displaying different right column html components)
- https://donations.diabetes.org/site/Donation2?18686.donation=form1&df\_id=18686
   &mfc\_pref=T (eMiles live form with different right column content)
- https://donations.diabetes.org/site/Donation2?df\_id=18685&mfc\_pref=T& 18685.donation=form1 (another mockup prototype with background image)
- https://donations.diabetes.org/site/Donation2?df\_id=18685&mfc\_pref=T& 18685.donation=form1&showbgvid=y (another mockup prototype with background html5 video)

The form as it is currently is Responsive / Mobile friendly developed using RWD approach (one form serves all) and it should supports major browsers and have been tested on at this time of writing 3/22/2016

- Chrome latest version and 1 version down
- · Firefox latest version and 1 version down
- IE Edge through IE8
- Opera latest version and 1 version down
- Safari latest version and 1 version down
- · iOS and Android devices

Knowledge of HTML5, HTML, JS and some of its common libraries (i.e. jQuery),CSS2/CSS3, Convio Stags, as well as Convio backend administration console (i.e. how to create/clone donation form ) would be strongly recommended in order to enable one to navigate through / made modification, enhancements of the existing template.

## WHAT THE TEMPLATE CONSIST OF? Important Note:

- If you are unsure, ALWAYS ASK for someone to guide you through, rather than making mistake that is irreversible.
- Under normal circumstances of cloning donation forms, only the highlighted yellow would be relevant for place to add things that are associated with cloning task.
- 1. Pagewrapper PageWrapper ID: 7122 and PageWrapper Name: Digital Marketing -- they are default wrapper for Digital Marketing Security Category of which all the forms built using would fall under. The PageWrapper would be the location to see all the external dependencies (i.e. javascript libraries, css), usually the first place to start when you embark on debugging activities, or if you plan to add improvement/enhancements out of the existing.

The core JS and CSS that handles the entire site/form functionality resides externally on the FTP. There's no need to touch/modify that on regular basis -- if need arises this will be discussed separately, but otherwise do not touch these files.

- 2. The backend donation form that would make the left column of the template. These forms are created from the backend administration console.
  - Newly created donation form should be created under "Digital Marketing" campaign (campaign ID: 8242).
  - There are currently 3 different form template types that have already been created to serve as Master Template so you could just use that to quickly copy a new instance out

of it. (Do not edit/customize the master template!) . Those Master DF templates are:

- Digital Marketing Donation Form Master Template ITS
   (FORM ID:18584) -- clone from this if you need the regular
   monthly/one time non premium and non eCard/Printed Card
   feature.
- Digital Marketing Donation Form Master Template
  with Premium ITS (FORM ID:18685) clone from this if
  you need a donation form with premium feature or you can
  clone from the above, and add the "Premium" data element
  afterwards (refer to "Premium" section within this note. Note: If
  you do choose this template, do not forget to disassociate existing
  premium with ask level of the cloned copy and re- associate those ask level
  of that cloned copy with whatever premium is requested.
- Digital Marketing Donation Honor Memorial Form
   Master Template ITS (FORM ID:18746) clone from this
   if you need an Honor / Memorial Form that comes with eCard /
   Print Card notification option/features. Note: you might want to
   refer to the "ecard" section within this note when it comes to customizing
   the selection of the eCard and important steps to follow

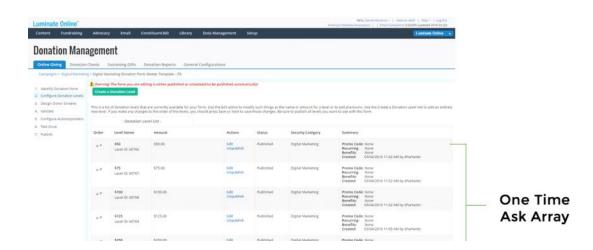
## >> Important notes on Cloning Donation Form

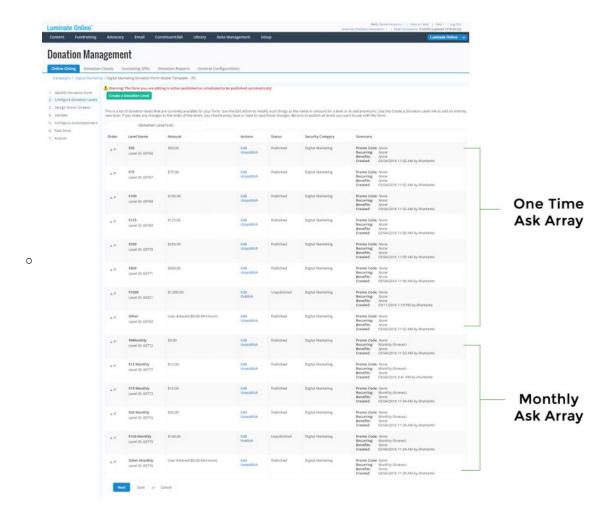
### >> Cloning Naming Standard Convention

- Per specification from MarComm who handles the GA and web tracking on these forms, use this naming convention for your newly cloned form -- YYYY FormName versionNum (DFID)
- DFID would be obtained post cloned, so you need to revisit and rename the form once the form has been created and the DFID of that form is given
- Always check if you see other existing forms with similar form name, then you might
  want to keep the form name the same as that one and revise the version number
  accordingly. (i.e. Memorial v1, next memorial will be Memorial v2 if that doesn't exist,
  but otherwise increase the version number accordingly)

#### >> Configure Donation Levels

- When a donation would have both Monthly and One-Time, the ordering plays critical role here for the template grouping mechanism -- you must put the One Time array set first (including the "Other" ask for one time) before laying out the Monthly Array set.
  - In most cases, you could reuse the current array set that comes with the copy and only create a new level if you have exhausted all these placeholder ask array.
  - If you end up creating some new array, make sure you re-order the placement so that all One-Time comes first before Monthly.
  - Unpublish any excess array that the newly cloned donation is not going to use!



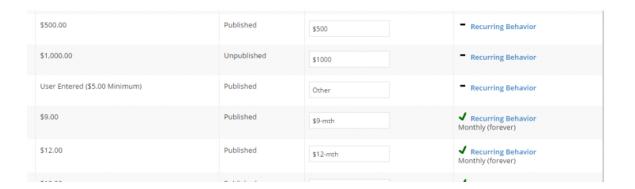


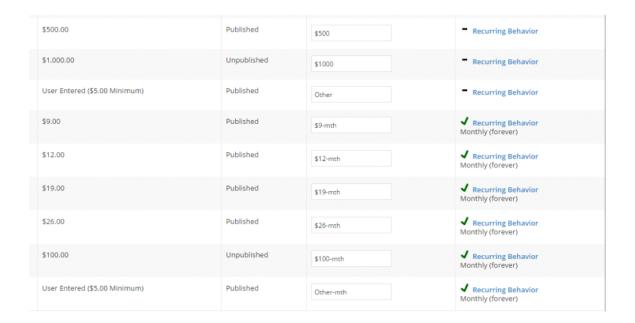
## >> Design Donor Screens - Labeling Donation Ask naming convention

Notice how the **label** naming convention is, when it's a one time we just simply put the amount with dollar sign without decimal, for "Other" ask amount one-time we keep that as "Other", and for monthly, we append the "-mth" (sans quote or whitespace) after the dollar amount, and as well on "Other" monthly, it will be "Other-mth"

This is very important as the template is looking for the above pattern in order to decide whether to put an ask array into the "One-Time" tab or "Monthly tab". Additionally, when a donation only going to have "Monthly" array, you are still to put -mth append for those ask array.

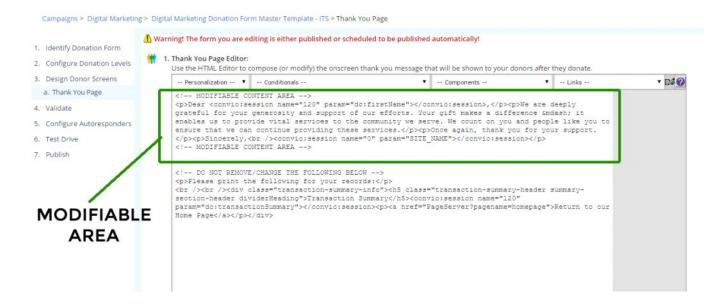
To make an ask amount a monthly, make sure you click on the "Recurring Behavior" associated to that ask array and you'll specify the recurring as monthly and don't forget to finalize your action by clicking "save' or "finish" for the system to remember your selection, and make sure the reordering is exactly as specified (One Time always first and Monthly second).





## >> Donation Thank You Page

You will see the "modifiable area" beginning/end through the comment line that indicate so as shown below:



You are likely not going to need to change any other configurations under normal circumstances, unless if a donation has premium(s) associated with its ask amount arrays.

### >>Premium

When requestor ask for their Ask Array to be associated with a premium, the list of available premium could be found under Fundraising > eCommerce (within "Products" tab). You would have to manually associate the specified ask amount of your newly created donation form with each of the premium(s) that requestor has selected for them through "Edit" actions.

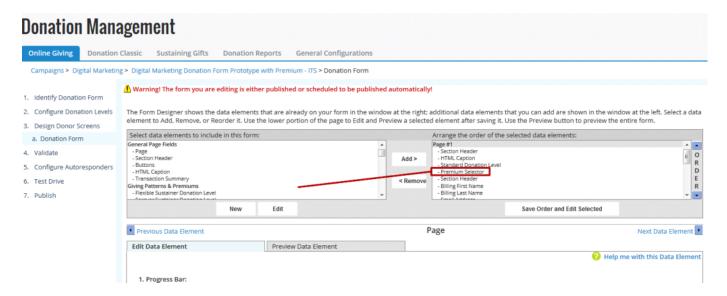
Note: Do not just simply "Add All" ask arrays but rather you have to manually scroll and find the exact donation ask amount you want to associate it with the premium

There are currently 15 listed premiums (they mostly belong to Direct Mail Sustainer campaign, although they could be reuse for some other donations. There are limit of how many premiums could be created within ADA CLO (might want to check with Convio support to find out the exact number for the limit) in case if you are running out and can't create different

premium that otherwise is unavailable. Also do not remove any already associated donation ask(s) within these premium, because they might currently be actively used for other campaigns that we might not be aware of.

Once ask amount has been associated, the next thing to do is to add the "Premium Selector" data element within your newly created / copied donation form (3. Design Donor Screens > Donation Form > Edit)

Note: you need to add that "data element" from the left to the right, just right after "Standard Donation Level" and hit "Save" to finalize your action.



## >>eCard/Print Card Memorial / Honor Form component

# Important Note: You might also want to refer to "E-Cards" one note for E-Cards specific knowledge base

Memorial and Honor donation form type almost always come with the Gift Notification components, they are eCard and Printed Card. When you make a clone copy of the Honor/Memorial form master template, you should see these components / data elements are already being added into your newly created copy. Do Not remove any of these existing components as they are specifically ordered and configured to work out of the box with the Digital Marketing template.

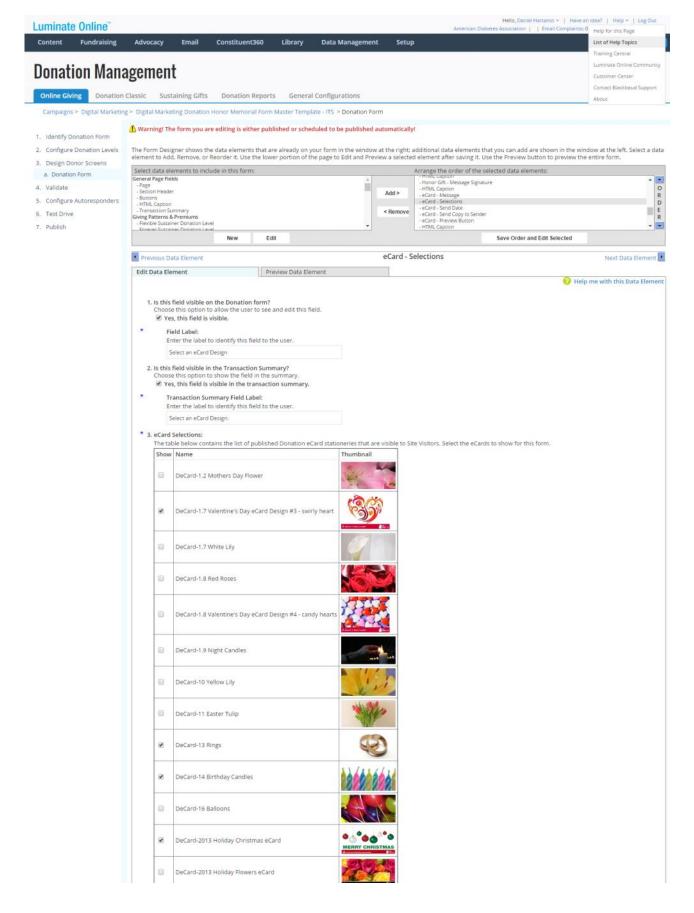
However, there are often times that the selection of the eCard would vary from one form to another depending on what initiatives / campaigns they might belong. In that case when a new set of selection is specified by the request and you need to make modification on the currenty selected eCard, you have to

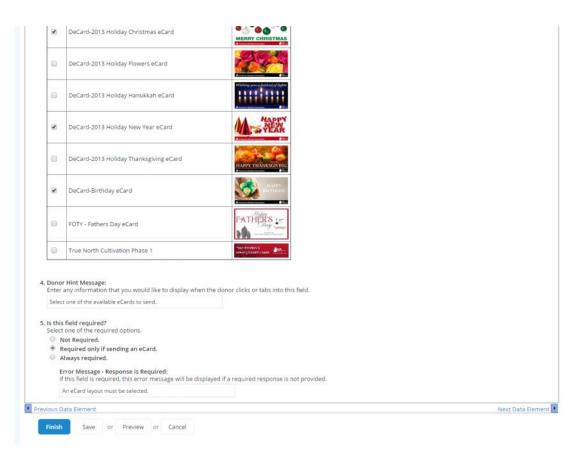
- a. First unpublish the donation form (take it offline) and then
- b. visit the "Design Donor Screens" > Donation Form Edit,
- c. find "eCard Selections" data elements from the right column scrollbox, and
- d. Once you find it and you click on that "Save Order and Edit Selected", further detail pertinent to that Data Component would be shown to you where you have the option to check / uncheck eCard that are going to be used for that particular form.
- e. Save, and re-publish the donation back online

Note: by default, 20 eCard array are the maximum Luminate Online Donation Form is allowed to have -- that means only 20 "active" eCard would be allowed for us to choose and these would be for all and each donation forms, thus that same 20 for everything (not set A of 20 ecards and set B of different 20 ecards). Thus it is our responsibility to advise rest of stakeholders that otherwise might not be aware of such limitation so that they can coordinate with rest of us in choosing which eCards are to be active, and which are to be deactivated and which to reuse (if applicable) at certain period of time (All eCard listings could be accessed under "Email" menu tab "Email" > "Stationery").

Updating an existing eCard look and feel would also be taking place within that "Email" > "Stationery" section and NOT from the donation form data elements component!

New graphic for eCard should have no more than 660px width dimension wise (660 is the standard for HTML email at this time of writing).





- **3. Reusable PageBuilder** Note: the highlighted are the foreseen place where future edits/additions mostly take place when it comes with creating new donation form that will be using the template:
  - DM\_Header -- this is where the logo resides and the reusable header (reus\_h) is also located within. You will see the following line of codes, to add new header just add a new <h1> line within make sure you id them according to the naming convention (i.e. dfheaderXXXXX replace that XXXXX with the actual dfid of the form, leave the class name as is, and change the text content for the H1 per requested.

```
<div id="dmbannerSlogan">
<h1 id="dfheader18584" class="dfheadercontent">Help Cure Diabetes. Donate
Today!</h1>
<h1 id="dfheader18685" class="dfheadercontent">Donate Today to Support a
Cure!</h1>
<h1 id="dfheader18725" class="dfheadercontent">Help Cure Diabetes. Donate
Today!</h1>
<h1 id="dfheaderXXXXX" class="dfheadercontent">PUT THE TEXT</h1>
</div></div>
```

 DM\_Right\_Col -- this is the repository holding all customizable right column contents for variety of forms that are built with using this wrapper.
 The following is the template for Right Column layout

<div class="dmrightitemtobottom dmrightcolitem right6">Item #6 - tobottom

</div>

- You have to put the above within the parent <DIV> with the ID "DMRightCol" -this parent DIV is already there. Do not add another one of this, you can just basically append the above template to the bottom just before the closing </div> of that parent DIV.
- You have to change the XXXXX within that DIV id of dfXXXXX with the actual ID of your newly created donation form. Keep the "dfrightcolcontent" class!

Note on this classes that you must adhere in order to benefit from the template feature:

- dmrightitemtobottom-- this will make the template put the content to bottom placeholder on Mobile View
- dmrightitemtotop -- this will make the template put the content of that div to top placeholder on Mobile View
- Keep that dmrightcolitem class on every of this sub <div>
- Number the class rightX accordingly, if you need more of these sub <div>s replace the X with the actual order number
  - □ Keep right3 with dmrightitemtobottom for Digital Marketing donation form template and right2 with dmrightitemtotop and make sure to refer to "Digital Marketing Form 1 spec sheet Worksheet Notes" to see what these should contain for that template purpose. The "right2" is used to hold the content for long paragraph for desktop and its mobile counterpart. To make it happened you need to add following classes that will handle the showing/hiding per defined CSS media queries breakpoint to indicate the transition from Desktop/Mobile.

<strong>LONG DESKTOP TEXT:</strong> Lorem ipsum
dolor sit amet, consectetur adipiscing elit. Sed et molestie libero. Nunc orci tortor,
cursus sed lacinia id, egestas id turpis. 
<strong>SHORT MOBILE TEXT:</strong> Lorem ipsum
dolor sit amet, consectetur adipiscing elit.

- o **DM\_Footer** -- this is reusable that handles the footer of the template
- DM\_Config -- this is for advanced configuration (NOT FOR general usage of Digital Marketing Template form) (i.e. specifying background image, videos, or force hide premium pertinent to Monthly/One-Time exclusion in addition to the regular association done through the backend). This contains add on features that otherwise are currently not advertised for general purpose of digital marketing donation form creation but is there in case if we need that in future (In future, I might probably translate this into JSON Angular JS) but for now here's the explanation:

<DIV> with id dfconfigXXXXX will be translated by the system to indicate there are further configurations for the following donation form ID (which ID replaces that XXXX). Each of this type of div could consist of the following span with classes

- enforcemobiletoptop -- this will override the ordering nature, making whatever specified here to be displayed first on top when in Mobile view. You just need to put the number which is actually the same number reference to that rightX class mentioned previously. If there is no override, just don't create it, or leave it blank
- enforcemobilebottomtop -- this will override the ordering nature, making whatever specified here to be displayed first within the bottom placeholder in Mobile view. You just need to put the number which is actually the same number reference to that rightX class mentioned previously (in the example below, right3 div when on mobile will be displayed above right1 div that would otherwise naturally be displayed first). If there is no override, just don't creat it, or leave it blank
- premiummonthly (boolean 1 or 0) -- this will hide premium selector component when the value is 0 or show when the value is 1. This is more for the use of addressing current default CLO behavior that would enable "Other" ask amount of

- premiummonthly (boolean 1 or 0) -- this will hide premium selector component when the value is 0 or show when the value is 1. This is more for the use of addressing current default CLO behavior that would enable "Other" ask amount of either one-time/or monthly to be associated within the premium despite their fixed counterpart has no association to it. If there is no override, leave it blank or don't create the span.
- premiumonetime (boolean 1 or 0)-- this will hide premium selector component when the value is 0 or show when the value is 1. This is more for the use of addressing current default CLO behavior that would enable "Other" ask amount of either one-time/or monthly to be associated within the premium despite their fixed counterpart has no association to it. If there's no override, leave it blank or don't create the span.

The template will automatically translate <DIV> with id dfbgXXXX to have a background image specified as value within that DIV as long as you specify the form ID to replace that XXXX placeholder

The template will automatically translate <DIV> with dfvidXXXX to have a background HTML5 video. These <DIV>s should consist of further following spans, in other words, we should have all three .ogv, .mp4, .webm video files alongside image src for the poster to ensure compatibility across different browsers, and the order of the span has to be exactly as shown in the example. Video should not be bigger than 5MB for bandwith sake

- dfvidposter -- to hold the path of the video poster
- dfvidogv -- to hold the path of the .OGV video
- dfvidmp4 -- to hold the path of the .mp4 video
- dfvidwebm -- to hold the path of the .webm video

Keep the parent <div style="display:none"> you just need to append your additional divs within!

Following snippets show different configuration specified for Form 18584 and Form 18685, where the latter would have more configuration including having videos, background images etc. Videos would trump background images but both are needed so that the background static image serves as fall back alternatives for those browsers / devices that otherwise do not support HTML5 video. (i.e. iOS doesn't support autoplay on HTML5 video, or IE8 they will display background static image instead)

```
<div style="display:none;">
<div id="dfconfig18584">
<span class="enforcemobiletoptop"></span>
<span class="enforcemobilebottomtop">3</span>
</div>
<div id="dfbg18685">../images/golf-promo-bg.png</div>
<div id="dfvid18685">
<span class="dfvidposter">../ws/digitalmarketing/videos/explore-poster.jpg</span>
<span class="dfvidogv">../ws/digitalmarketing/videos/explore.ogv</span>
<span class="dfvidmp4">../ws/digitalmarketing/videos/explore.mp4</span>
<span class="dfvidwebm">../ws/digitalmarketing/videos/explore.webm</span>
</div>
<div id="dfconfiq18685">
<span class="premiummonthly">1</span>
<span class="premiumonetime">0</span>
</div>
</div>
```

Working with CLO PageBuilder / Page Wrapper - General Ruleset:

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- IMPORTANT! DISABLE WYSIWYG would be a must observed action prior to editing any of our <u>pagebuilders</u> due to CLO WYSIWYG tendency to strip Javascripts/CSS/or anything that it interprets as non-content for end-user to generate. It is actually ideal for us developer to disable WYSIYWG entirely from our CLO administrative backend!
- IMPORTANT! Always make new version out of the active one so when things are not working we could always roll back to the previous version (unless if this is a very minor edits i.e. text edit)