



Whitepaper

Do-It-Yourself Templates

*Using Your Own Content to
Create Message Templates*

August 4, 2010

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Introduction

Do you have existing newsletters that you'd love to use as a template? Maybe you have an existing template that you'd like to use as a basis for a new one. Or, maybe you'd like to create a template from scratch. If any of these situations have been on your mind lately, then this document is what you need. With it, you'll learn how to create any template you want, from scratch, by uploading, by copying from another template, or by copying from a previously defined job.

Giving Users the Right to Create and Administer Templates

Before users can create templates, the system administrator will need to give them the right to create and administer templates. Giving a user this right can be done on the User Rights Management for Maestro User Interface screen in the Administration Hub. To access this screen, click the **Administer User Accounts** icon on the homepage of the Administration Hub. From the Administer User Accounts and Identities screen, click **User Rights Management for Maestro User Interface**. The User Rights Management for Maestro User Interface screen opens. Click the **Displayed Accounts** drop-down menu and select the group of accounts you'd like to view.

Figure 1: Giving Users the Right to Create and Administer Templates

User Rights Management for Maestro User Interface

Use the checkboxes to define the user rights of the corresponding accounts.

Displayed accounts:

User	Create Jobs	Create Reports	Admin Sender Profiles	Admin Drop-Ins	Admin Content Templates	Admin Target Groups	Admin Datasets	Link Datasets & WA	Designated Job Owner
iani	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<This Account>
iht	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<This Account>
raw	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<This Account>

To grant a user the right to create and administer templates to define a message, check the **Admin Content Templates** box for that user.

To apply the changes before switching to a different group, click the **[Apply]** button. To apply the changes and leave the page, click the **[OK]** button.

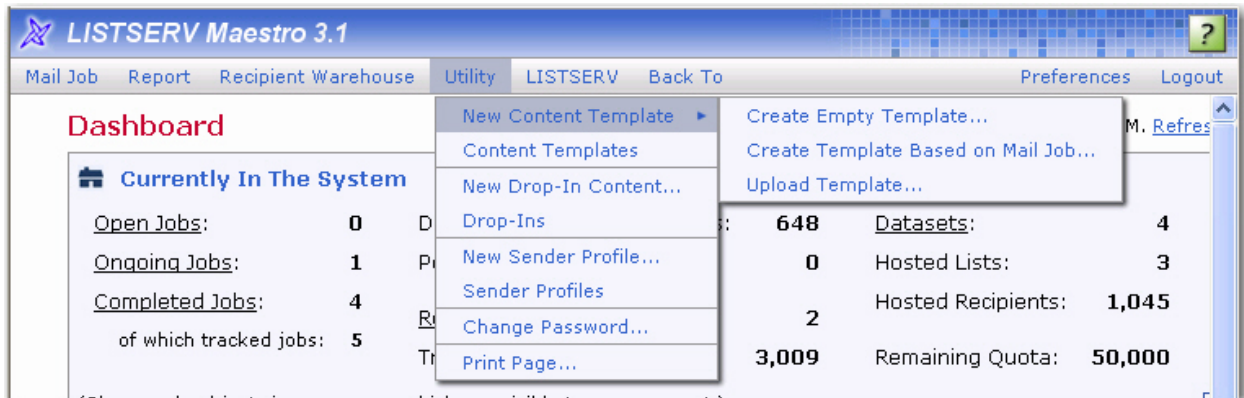
After the administrator has given you the right to administer content templates, then the **Utility** menu will contain two new options – **New Content Template** and **Content Templates**.

Tip: This user right can also be granted on the User Right Settings screen for a specific user. For more information on this screen and on using the Administration Hub, see the [Administrator's Manual for LISTSERV Maestro](#).

Creating Templates

After the administrator has given you the right to administer content templates, then the **Utility** menu will contain two new options – **New Content Template** and **Content Templates**. The **New Content Templates** option gives you several ways to create a new user-defined template by copying a system template, by using your own content, or by selecting content from a previous job; in addition, the **Content Templates** option lets you manage and copy any existing templates.

Figure 2: The New Content Template Option and Submenu



Creating a Copy of a System Template

System templates are pre-defined templates that come together with LISTSERV Maestro. A system template can not be used for content definition directly, but they can be copied and used as a base for a new user-defined template.

To copy a system template, click the **Utility** menu, and then select **Content Templates**. The Manage Content Templates screen opens. In the **System Templates** section, you'll find a list of the system templates that you can copy.

Click on the template's name to open the View System Template screen. From this screen, you can preview the system template. To create a user-defined template based on this system template, click the **Create New Template** link in the upper right of the screen. The Create User-Defined Template Based on System Template screen opens.

Figure 3: Creating a Copy of a System Template

The dialog box is titled 'Create User-Defined Template Based on System Template'. It contains the following elements:

- Text: 'Please enter the title and subject of the new template.'
- Text: 'System Template Name: *Basic HTML Newsletter*'
- Text: 'User Template Name: [input field]'
- Text: 'Subject: [input field] (optional)'
- Checkbox: 'Allow advanced editing of template source during mail job content definition' (unchecked)
- Checkbox: 'Enable new template' (checked)
- Buttons: 'Create Template' and 'Cancel'

The user-defined template will initially be created as an exact copy of the system template, except for the following settings, which you are now asked to provide for the new template:

- **User Template Name** – Enter the name for the new user-defined template.
- **Subject** – Enter the subject line for the new user-defined template. This setting is optional and can be left out, in which case the subject line of the user-defined template will remain empty.
- **Allow advanced editing of template source during mail job content definition** – When a template is used when defining a message, then the user who uses the template only has to "fill in the blanks" that are left by the template placeholders. The user does not have to bother with the actual message body, as this body is already defined by the template.

Therefore, by default, when a template is used to define a message it is not even possible to modify the message body, except by filling out the placeholders.

Under some circumstances, you may want a user to not only fill out the placeholders but to also modify or edit the whole of the message body. This is what this option is for; if checked, then editing of the message body outside of the placeholders is allowed while the template is being used for content definition. If not checked, then only the placeholders can be filled out.

- **Enable new template** – Only user-defined templates that are in the "enabled" state may be used to define a message. Check this option if you want the new user-defined template to be enabled right from the beginning, or uncheck it if you want to create the new template in the disabled state (this allows you to edit it further before you enable it).

Note: All these settings can later be changed again, so if you are not sure about any setting, just enter what fits best at the moment.

Click the **[Create Template]** button to create the new user-defined template. The new user-defined template will be displayed in the **User-Defined Templates** section of the Manage Content Templates screen.

Notes: For more information on the Manage Content Templates screen, see the *Managing Existing Templates* section.

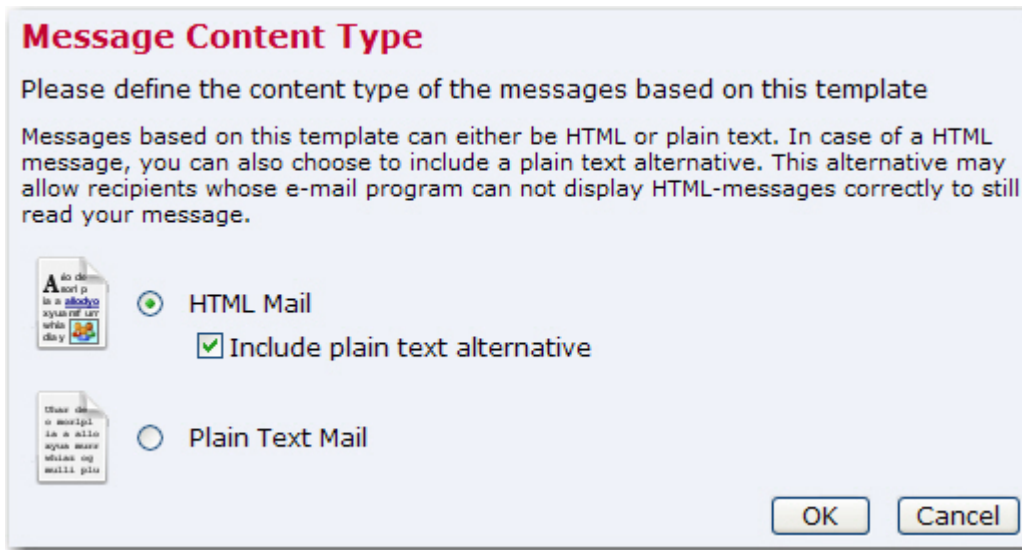
Creating an Empty Template

To create a new, empty template, click on the **Utility** menu, select **New Content Template**, and then select **Create Empty Template**. This opens the Edit Content Template screen with a new "blank" template. This template can be used to create a plain text or HTML template.

To define a plain text template, click on the **Text** icon, and then select **Plain Text Mail** on the Message Content Type screen.

To define an HTML template, click the **HTML** icon, and then select **HTML Mail** on the Message Content Type screen. If you want a plain text alternative for your HTML message, then select the corresponding **Include plain text alternative** checkbox.

Figure 4: Creating an Empty Template



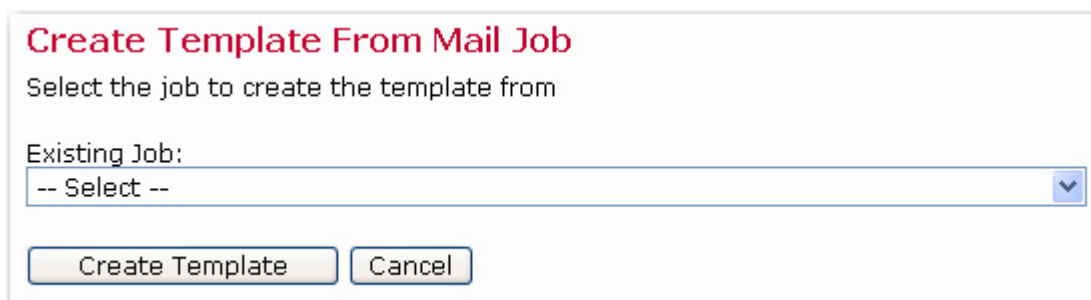
Note: Creating HTML templates is an advanced feature and should only be performed by those familiar with HTML Coding. For further details on creating this type of template, see the Message Templates: Advanced Techniques whitepaper entitled *Going Above and Beyond: Using Advanced Techniques to Create Customized HTML Templates*.

Next, you'll want to define your content on the Edit Content Template screen. For more information, see the [Defining the Template Content](#) section.

Creating a Template Based on an Existing Job

To create a template based on an existing job, click on the **Utility** menu, select **New Content Template**, and then select **Create Template Based on Mail Job**. This opens the Create Template From Mail Job screen.

Figure 5: Creating a Template Based on an Existing Job

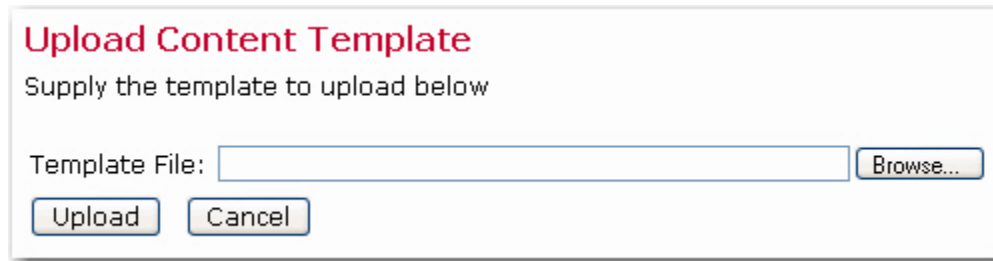


Click the **Existing Job** drop-down menu, select the job you want to use for your template, and then click **[Create Template]**. The Edit Content Template screen opens with the new template pre-populated with the same content as the selected source job. From this screen, make any changes to the template, and then click **[OK]** to save. For more information on the Edit Content Template screen, see the [Defining the Template Content](#) section.

Uploading Pre-Defined Text

To create a new template by uploading pre-defined text, click on the **Utility** menu, select **New Content Template**, and then select **Upload Template**. The Upload Content Template screen opens.

Figure 6: Uploading Pre-Defined Content



Enter the filename of the content template ZIP-file located on your local system or use the **[Browse]** button to browse for the file, and then click **[Upload]** to upload the template.

Note: The uploaded template ZIP-file must be a file that has previously been downloaded from LISTSERV Maestro (which can also be a different LISTSERV Maestro instance) with the download link provided on the template list page.

Once you have uploaded the template file, you will be taken to the Edit Content Template screen, which is where you can make any additional changes to the uploaded template before saving it. For more information on this screen, see the [Defining the Template Content](#) section.

Creating a Copy of an Existing User-Defined Template

To create a template as a copy of an existing template, click on the **Utility** menu and then select **Content Templates**. The Manage Content Templates screen opens. This screen contains a list of all user-defined and system templates. To copy any of these templates, simply click the **Copy** link next to the template you'd like to copy. A copy of the template is added to the **User-Defined Templates** section. Once the copy is complete, you'll want to rename the template. To do this, click on the name and rename it on the Edit Content Template screen.

Tip: For more information on the Manage Content Templates screen, see the [Managing Existing Templates](#) section.

Defining the Template Content

The Edit Content Template screen is where you can define the template name, subject, and message content. The various options available for the message content are displayed in the icon at the top of the screen. Any options that are enabled are displayed with a green checkmark. The icons in the bar are also clickable and are used to change the corresponding settings.

The **Subject field** is the subject line of the message. It is mandatory and must be filled out.

The **HTML Preview tab** displays the HTML body of the message, with all drop-in elements resolved. If errors have been encountered while LISTSERV Maestro has tried to replace the drop-in placeholders with the drop-in content, then an error message is displayed and the un-replaced drop-in placeholders are highlighted in the HTML preview.

The **HTML Code tab** contains the source code of the HTML body of the message. From this tab, you can also insert an existing placeholder into your message content. For more information, see the [Using Template Placeholders](#) section.

The **Text Preview tab** displays the plain text alternative option for the HTML mail. The alternative text is a plain text body that is an "alternative" for the more elaborate HTML body of the message. Recipients whose email client does not display HTML may default to the plain text alternative allowing them to receive a message. To reach the highest number of recipients, it is generally a good idea to use an alternative text with each HTML message.

This tab is a preview of the alternative plain text body of the HTML email message, with all drop-in elements resolved. If errors have been encountered while LISTSERV Maestro has tried to replace the drop-in placeholders with the drop-in content, an error message is displayed and the un-replaced drop-in placeholders are highlighted in the alternative text preview.

The **Text tab** contains the plain text alternative. From this tab, you can also insert an existing placeholder into your message content. For more information, see the [Using Template Placeholders](#) section.

At the bottom of the screen, there is a row displaying the language character set that will be used for the template. Depending on how the administrator has configured LISTSERV Maestro, this appears as a clickable link that allows you to change the language character set.

To test how the current template would behave when used in the content definition of a mail job, click the **Test Template** link.

To delete the current template, click the **Delete Template** link.

To leave the screen and store any changes made to the template, click the **[OK]** button. To leave the screen without storing, click **[Cancel]**.

Using Template Placeholders

Template placeholders make content templates easy to use and truly customizable, as they define the "blanks" that the user will have to fill out. A template placeholder appears in the template body in the following form:

```
{ { #NAME } }
```

where "{ {" and "}" are the opening and closing tags, and "NAME" is replaced with the name of the placeholder. The "#" character that prefixes the name must always appear for a template placeholder.

A placeholder with a given name can appear several times throughout the template body and may appear both in the HTML and the plain text part, if the placeholder's type allows this.

The opening and closing tags for the placeholders can be freely defined and can be any characters you like that do not contain any spaces. "{ {" and "}" are suggested as defaults, but you may change them by clicking the **Placeholders** icon on the Edit Template Content screen.

Note: The opening and closing tags that are defined for the placeholders will also be used for drop-ins, if drop-ins are enabled for the template. It is important to choose opening and closing tags with care, making sure that they do not otherwise appear in the template. For example, if you decide to use parentheses '(' and ')' for opening and closing tags, any text that appears between any set of parentheses will be interpreted as the name of a template placeholder or drop-in. Since parentheses have a high probability for use in the normal text of a message, using them as tags is not recommended because they may cause an error in placeholder or drop-in name look up, leading to mail delivery failure.

On the HTML Code and Text tabs, it is possible to insert an existing placeholder. To do this, you can either type its { {#NAME} } tag where you'd like the placeholder to appear in the message, or you can open the Insert Placeholder screen by clicking the [Click here to insert a placeholder](#) link or by pressing **CTRL+Space**. In this screen, select an existing placeholder from the list on the left and click **[OK]**, which will automatically insert the placeholder's { {#NAME} } tag at the current cursor position.

Using Drop-In Content

To use drop-in content in your template, you first need to enable it. Drop-in content is disabled by default for a newly created template. To enable drop-in content, click on the **Drop-Ins** icon on the Edit Template Content screen. This icon is also used to change the current settings or to disable drop-ins for the template.

Drop-ins use an opening and a closing tag. These tags are used by LISTSERV Maestro to identify the names of the drop-in content. In content templates, the opening and closing tags used for drop-ins must be the same as used for the template placeholders. Therefore, changing the tags for drop-ins also changes the tags for the template placeholders and vice versa. Opening and closing tags can be any characters you like that do not contain any spaces. "{" and "}" are suggested as defaults, but you may change them.

To include drop-in content in your template, simply enter the name of the drop-in at the appropriate location, enclosed in the tags you have defined. For example, if your drop-in is called "sample" and you are using the suggested default tags, then you would include the text "{{sample}}" in the location where you want the drop-in content to appear in the final message.

Whenever LISTSERV Maestro finds the opening tag followed by the closing tag, it will interpret all the characters in between first as a template placeholder name. If no placeholder with this name is found, then the name is instead interpreted as the name of a drop-in. LISTSERV Maestro will then look up the list of available drop-ins for a drop-in with this name. If the name is not found, delivery of the mail fails with an error message like "Drop-In with name 'sample' not found".

If drop-in content is disabled, any drop-in placeholder names that might appear in the message will not be replaced with the corresponding content. Instead, the placeholder names will appear verbatim in the body of the message.

For more information on drop-ins, see the [User's Manual for LISTSERV Maestro](#).

Defining the Template Settings

The Template Settings tab on the Edit Content Template screen is available for both plain text and HTML templates.

The **General Settings** section contains two options:

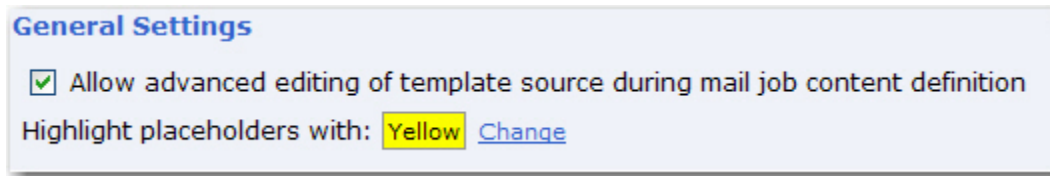
- **Allow Advanced Editing** – When a template is used during the content definition of a mail job, then the user who uses the template usually only has to "fill in the blanks" that are left by the template placeholders. The user does not have to bother with the actual message body, as this body is already defined by the template. Therefore, by default, when a template is used to define the message content, it is not even possible to modify the message body, except by filling out the placeholders.

Under certain circumstances, it may be desirable to allow a user to not only fill out the placeholders but to also modify or edit the whole of the message body. This is what this option is for. If checked, then editing of the message body outside of the placeholders is allowed while the template is being used for content definition. If not checked, then only the placeholders can be filled out.

- **Highlight Placeholders** – When a template is used to define the message content, then the user will have to provide content for all placeholders in the template. To make this process simpler for the user, LISTSERV Maestro highlights the currently selected placeholder in the preview.

To select the background color for this highlighting, click the **Change** link and select a color. Make sure to use a color that has a good contrast in comparison to the foreground color used in the template.

Figure 7: Allowing Advanced Editing



The **Template Placeholders** section contains a table of all placeholders that are currently defined in the template.

Figure 8: List of Template Placeholders

Template Placeholders

This list shows the currently defined placeholders.

Placeholder	Display Title	Value Type	Mandatory	
ADDRESS-PHYSICAL	Physical address of your organization	Plain Text	Yes	Edit Copy Delete
ARTICLES	Body text for articles	Plain Text (multiple values)	Yes	Edit Copy Delete
BYLINES	Bylines for articles	Plain Text (multiple values)	No	Edit Copy Delete
HEADERS	Headers for articles	Plain Text (multiple values)	Yes	Edit Copy Delete
IMAGE-LOGO	Logo in top-left corner of header	Binary (linked or inline)	Yes	Edit Copy Delete
IMAGES	Images to go with articles	Binary (linked or inline, multiple values)	No	Edit Copy Delete
NEWSLETTER-FOOTER	Footer text for newsletter	Plain Text	Yes	Edit Copy Delete
NEWSLETTER-HEADER	Header text for newsletter	Plain Text	Yes	Edit Copy Delete
NEWSLETTER-ISSUE	Issue number for newsletter	Plain Text	Yes	Edit Copy Delete
URL-READMORE	URLs to read entire articles	Plain Text (multiple values)	No	Edit Copy Delete
URL-UNSUBSCRIBE	URL to unsubscribe	Plain Text	Yes	Edit Copy Delete
URL-WEB	URL to view newsletter in browser	Plain Text	Yes	Edit Copy Delete

[Add Placeholder...](#)

Each placeholder is displayed with its name, display title, value type, mandatory/optional state, and the following actions:

- **Edit:** Click this link to edit this placeholder. The Edit Placeholder screen opens. From here, make changes to the placeholder and then press **[OK]** to save.
- **Copy:** Click this link to create a new placeholder as a copy of this one. A copy of this placeholder will appear in the list. Once the copy is created, rename the placeholder and make any other changes you'd like to make. To do this, click the **Edit** link.
- **Delete:** Click to delete this placeholder. You will be asked if you really want to delete the placeholder. Click **[OK]** to confirm.

The **[Add Placeholder...]** button at the bottom of the tab lets you create a new placeholder. Once you click on this button, the Edit Placeholder screen opens. From this screen, you can enter the information for the new placeholder.

Note: Adding template placeholders is an advanced feature. For more information on this feature, please see the [Message Templates: Advanced Techniques](#) whitepaper entitled *Going Above and Beyond: Using Advanced Techniques to Create Customized HTML Templates*.

Managing Existing Templates

The Manage Content Templates screen lists all currently available content templates for editing and other management of the templates. To access this screen, click on the **Utility** menu from the Toolbar, and then select **Content Templates**.

The user-defined templates are the content templates that can actually be used in the content definition of a mail job. These templates are located at the top of the Manage Content Templates screen.

Each user-defined template is displayed with its name, date/time of last change, and its status:

- **Incomplete** – The template definition is not yet complete; therefore, the template can also not be enabled.
- **Complete** – The template definition is complete; however, the template has not yet been enabled and can not be used in the content definition of a mail job (the template will not appear in the list of available templates when defining a job's content).
- **Enabled** – The template is complete and enabled and can be used in the content definition of a mail job.

Figure 9: Managing Templates

Template Name	Date/Time saved	Status			
Customer Support Newsletter	Jun. 25, 2007 01:42:23 PM	Enabled	Copy	Disable	Download
Marketing Newsletter	Jun. 25, 2007 01:42:59 PM	Enabled	Copy	Disable	Download
Sales Newsletter	Jun. 25, 2007 01:43:31 PM	Complete	Copy	Enable	Download
Weekly Newsletter	Jun. 25, 2007 01:41:50 PM	Enabled	Copy	Disable	Download

Click on a template name to edit or delete the template or use any of the action links that may appear next to the template name:

- **Copy** – Create a new template as a copy of this template.
- **Enable** – Enable a currently disabled complete template.
- **Disabled** – Disable a currently enabled complete template.
- **Download** – Download the template in form of a ZIP file that contains all data of the template. This ZIP file can then be used to create a new template in this or any other LISTSERV Maestro instance by uploading it again. This link is only displayed for the administrator.

System templates are pre-defined templates that come together with LISTSERV Maestro. A system template can not be used for content definition directly, but they can be [copied](#) and used as a base for a new user-defined template.

Where to Go From Here

This document has given you the basics for creating, editing, and managing your templates. To learn more advanced techniques, including how to create customized HTML templates and how to create and edit placeholders, please see the Message Templates: Advanced Techniques whitepaper entitled *Going Above and Beyond: Using Advanced Techniques to Create Customized HTML Templates*.

For basic information on how message templates work and how to define a message using a template, please see the Message Templates: Getting Started whitepaper entitled *No HTML Coding Experience Necessary! Creating Professional Looking HTML Message without Coding*.

References

LISTSERV Maestro User's Manual

<http://www.lsoft.com/resources/manuals.asp>

The Message Templates: Getting Started whitepaper entitled *No HTML Coding Experience Necessary! Creating Professional Looking HTML Message without Coding*

The Message Templates: Advanced Techniques whitepaper entitled *Going Above and Beyond: Using Advanced Techniques to Create Customized HTML Templates*

<http://www.lsoft.com/resources/whitepaper.asp>