## Email Template Guide

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LASSO EMAIL TEMPLATE EDITOR

About Lasso Email Template Editor

Within Lasso is an Email Template Editor which gives you the ability to create formatted Email Templates that can be sent to individual Registrants or to lists of Registrants via Mass Mail. Not only is Lasso’s Email Template Editor easy to use but you are also given the option of utilizing the Template Library, where you can find a wide selection of templates to which you can make modifications to suit your needs.

CREATING AN EMAIL TEMPLATE

Accessing Email Templates

To access Email Templates:

1. In the Sales Center, hover over Marketing and select Templates from the dropdown.

2. In the Templates screen, you will see the template folders and their contents, as well as a row of template tabs that will bring you to Lasso’s Template Editor and Library.
   a) Click on a folder to view its contents.
   b) Click on an existing template to view or edit in the Edit Template screen.
   c) Click on New Template to create an Email Template.
   d) Click on Template Library to access various styles of Email Templates which you can modify to create your own Email Template.

***Change image

Create new template    Access Template Library

Click on a folder to view its content    View and edit existing Email Templates

Note: All Email Templates must reside within folders. Before adding an Email Template, make sure its folder has already been created. Please refer to the next section on Adding an Email Template Folder for more information.
Adding an Email Template Folder

When an Email Template is created, it needs to reside in a folder in the Email Templates area of Lasso. You can create your Email Template in an existing folder or add a new folder. Folders can be made Public or Private, depending on whether the templates within are to be shared by other Lasso Users or not.

To add an Email Templates Folder:

1. In the Templates screen, click on the Add Folder button under Folders.

   ![Add Folder Button](image)

   **Warning:** There is a default folder called Specialized Templates, which is for Opt-In and Opt-Out templates only. Do not create your general Email Templates in the Specialized Templates folder.

   Please refer to the section entitled About Specialized Templates for more information.

2. Enter a name for the folder in the Name field.
3. Beside Permission, select Private or Public from the dropdown.
   - Selecting Private will make the template available only to the User who created them.
   - Selecting Public will make the template available to all Sales Center Users on the project.

4. Click Save.
Basic Principles of Designing an Email Template

There are some basic principles to follow when adding content to an Email Template. The guidelines presented here will help you to create a template that looks professional and has a greater chance of being opened by the recipient. The key elements of designing an Email Template are as follows:

- **Begin with Tables.** Always create your content inside a table so that items will align correctly when viewed in different browsers. Think of it as items contained within a frame. Begin with one table and insert additional tables within for the different items in your email, i.e. header, main content, footer. It is also recommended to add a **Table Caption** at the top of the template which contains text regarding the purpose of the email and a call to action. This allows recipients viewing the email on a mobile device to see what the email is about without having to scroll further or download images.

- **Insert Images** into individual rows of a table. For example, insert a header image into the first row of a table and a footer image into the last row. Header and footer images should be no wider than 650 pixels and other images within the main content of the email no wider than 400 pixels. Use **pixels** to define width and height instead of percentage to prevent the design components from fluctuating with the recipient’s window size. All images must be formatted in .jpg, .gif, or .png and must be **no larger than 2 MB**.

- **Use Lasso Tokens.** Adding tokens will automatically populate Registrant and Sales information from the database. For example, add the Registrant First Name token to the email greeting so that it will display the email recipient’s name. Specialized Tokens include Opt-Out, Website Analytics, and Web View links.

- **Include Hyperlinks.** It is recommended that a hyperlink to the project website be included so that the recipient can go directly to the website if they choose. As well, you can add hyperlinks to documents such as floor plans or press releases. Other uses for hyperlinks include thumbnail images hyperlinked to full images and images hyperlinked to documents.

**Note:** It is recommended that you create your Email Template using Internet Explorer or Firefox. Other browsers may have limited functionality when using the Lasso Email Editor.
Creating a General Email Template

Once you have a folder ready for the template you want to create, your next step is to add the template. To add a general Email Template:

1. In the Templates screen, click on the folder in which you want to create your Email Template. Do not use the Specialized Templates folder unless you want to create an Opt-in or Opt-out template. For more information, please refer to the section entitled About Specialized Templates.
2. Click on New Template.
3. This brings you to the Add Template screen where you can begin to complete the fields as follows:
   a) **Name** – Enter a name for your Email Template. This is the name that will show in the list of Folder Contents.
   b) **Subject** – Enter a subject for the email. This will show in the Subject line of your email to the recipient. Avoid using capital letters, exclamation marks, and words such as “Clearance” to prevent Spam filters from regarding the email as unsafe. (Refer to the Text Content section under Email Guidelines for additional information.)
   c) **Content** – Add the content for your Email Template. On the toolbar, you will find basic functions for formatting text as well as inserting tables, images, hyperlinks, and Lasso tokens. Mouse over each button on the toolbar for a description of its function.
## Converting Prospects to Purchasers.

### Toolbar Functions

<table>
<thead>
<tr>
<th>Toolbar Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Save Email Template</td>
<td>21. Clean up HTML source code</td>
</tr>
<tr>
<td>2. Preview Email Template</td>
<td>22. Edit HTML source code</td>
</tr>
<tr>
<td>3. Change text to <strong>Bold</strong>, <em>Italics</em>, <strong>Underline</strong>, or <strong>Strikethrough</strong></td>
<td>23. Toggle Subscript or Superscript</td>
</tr>
<tr>
<td>4. Align text to the left margin, center, right margin, or both margins</td>
<td>24. Insert special character</td>
</tr>
<tr>
<td>5. Decrease or increase indent</td>
<td>25. Open to full window</td>
</tr>
<tr>
<td>6. Select font type</td>
<td>26. Spellcheck text</td>
</tr>
<tr>
<td>7. Select font size</td>
<td>27. Insert, edit, or remove hyperlink</td>
</tr>
<tr>
<td>8. Select format such as paragraph, heading, etc.</td>
<td>28. Insert file</td>
</tr>
<tr>
<td>9. Cut, copy, or paste content</td>
<td>29. Insert or edit image</td>
</tr>
<tr>
<td>10. Paste from a Word document</td>
<td>30. Insert image (shortcut)</td>
</tr>
<tr>
<td>11. Insert or edit a table</td>
<td>31. Insert Registrant token such as name or company</td>
</tr>
<tr>
<td>12. Format table row or cell properties</td>
<td>32. Insert Sales Rep token such as name or phone number</td>
</tr>
<tr>
<td>13. Insert row before or after existing row or delete</td>
<td>33. Insert Self Serve Registrant Update</td>
</tr>
<tr>
<td>14. Insert column before or after existing column or delete</td>
<td>34. Insert Specialized token such as Opt-In, Opt-Out, or Web View</td>
</tr>
<tr>
<td>15. Merge or split table cells</td>
<td>35. Insert Social Media link</td>
</tr>
<tr>
<td>16. Show or hide guidelines and invisible elements</td>
<td>36. Edit CSS Style</td>
</tr>
<tr>
<td>17. Insert horizontal line, bulleted list, or numbered list</td>
<td>37. Insert non-breaking space</td>
</tr>
<tr>
<td>18. Undo or redo last entry</td>
<td>38. Find and replace text based on specific criteria</td>
</tr>
<tr>
<td>19. Select text color or text background color</td>
<td>39. Print the Email Template</td>
</tr>
<tr>
<td>20. Remove text formatting</td>
<td></td>
</tr>
</tbody>
</table>

---

**Lasso Data Systems Email Template Guide**

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Inserting Tables

When you are ready to add the content to your Email Template, begin by inserting the table that will frame your email. You will add additional tables for your header, footer, and content inside this frame as follows:

- Table #1 is the frame in which the second and third tables will reside.
- Table #2 gets inserted inside the frame and consists of three rows – the top row for the header image, the middle row for the email content, and the last row for the footer image.
- Table #3 gets inserted into the middle row of the second table to contain the email content.

Creating these tables within tables will ensure that your final product will look clean and professional.
To insert a table into your Email Template:

1. Open your Email Template and position your cursor in the main content area of the email.

   **Tip:** Click on the **Full Window** button if you want to view the template in the full screen. Click on the button again to return to the original screen.

2. Click on the **Insert Table** button on the toolbar.

3. In the Insert/Edit Table window, under the **General** tab, specify the **Size** of the table. Enter 1 in the **Columns** field and 1 in the **Rows** field.

4. In the **Width** field, enter pixels or a percentage by typing the number followed by px or %. Your Email Template should be no wider than 650 pixels so that recipients of the email do not have to scroll to view it in their Inbox. If you enter a number without 650 px or %, it will automatically default to pixels.

5. In the dropdown beside **Alignment**, select **Center** from the dropdown.

6. Check the box beside **Table Caption**. This will include a row where you can add a description announcing the purpose of your email for recipients viewing it on a mobile device.
7. Click on the Advanced tab to make other changes such as the border color.
8. When you’ve entered your selections, click on Insert to add the table to your template.

9. If you checked the box beside Table Caption, you will see a table containing two rows. Position your cursor inside the top row and add content to describe the purpose of your email with a call to action, such as “Attend our Open House on April 4th.”
10. To insert the main table that will contain your header, footer, and content, position your cursor inside the second row of the frame and right-click. Select Insert/Edit Table.

11. In the Insert/Edit Table window, under the General tab, specify the Size of the table. Enter 1 in the Columns field and 3 in the Rows field. Rows 1 and 3 are for the header and footer images of your template while the middle row is for the main content.

12. In the Width field, enter 650, as with the 650 pixel frame table, so that recipients of the email do not have to scroll to view it in their Inbox. If you enter a number with px or %, it will automatically default to pixels.

13. In the dropdown beside Alignment, select Center from the dropdown.

14. When you’ve entered your selections, click on Insert to add the table to your template.
Your template should look like this:

![Email Template Diagram]

Your next step is to insert images into Rows 1 and 3 for your header and footer, leaving Row 2 for the main content of the email.

**Note:** The Template Library contains a Basic Template consisting of tables as described above. If you prefer, you can use the Basic Template to build your own. Please refer to the section of this document entitled Using the Template Library for more information.
Inserting Images

Inserting images into tables within the Email Template will keep them aligned and rendering similarly in different browsers. Start with the header and footer and insert other images in the same manner.

Before you begin, make sure the images you are using are:

a) formatted in .jpg, .gif, or .png
b) no wider than 650 pixels
c) no larger than 2 MB

Note: 650 pixels is the recommended maximum width for header and footer images. Ensure that images are the same size or smaller than the tables they reside within as the tables will expand to accommodate the image sizes. A maximum of 400 pixels is suggested for other images within the email so that they do not expand from edge to edge as the header and footer images do.

To insert an image into the Header:

1. Position your cursor in the first row of the main table.

2. Click either the Insert/Edit Image button or the Insert Image shortcut button on the toolbar.

   a) The Insert/Edit Image button takes you to the Insert/Edit Image window where you can enter details such as Image Description, Alignment, Dimensions, Border, Vertical Space, and Horizontal Space. After completing your entries, you will be taken to the Image Manager window.

   b) The Insert Image shortcut button will take you directly to the Image Manager window. Use this button if you do not need to enter Image details.

Note: Because most ISPs have images turned off as the default, you should always include an Image Description so that the recipient can read what the image is without seeing it. The Image Description field is referred to as an Alt Tag for HTML coding purposes. If you are using the Insert Image shortcut button, you can add an Image Description afterward using the Edit function.
3. In the **Insert/Edit Image** window, click on the browser button beside **Image URL**.

4. In the **Image Manager** window, select the **Category** or **Folder** where you would like the image to reside. Click on **My Images** if you are the only one who needs access to the image. Click on `<Project Name> Images` if you would like other Lasso Users to be able to access the image as well.

   **Note**: The top bar of the **Image Manager** tells you which **Category** and **Folder** you are in.

5. Click on **Upload**.
6. In the **Upload** window, click on **Choose Files**, and find and select the file containing the image you want to upload.

![Upload window](image1.png)

7. When you have selected the correct file, click on **Upload to server**.

![Upload window](image2.png)

You will see the uploaded image in the **Image Manager** window. Click on the image to select it.

**Note:** If you are inserting an image via the **Insert Image** shortcut button, your image will be immediately inserted into the template. If you are inserting the image via the **Insert/Edit Image** button, you will be taken to the **Insert/Edit Image** window where you can enter an **Image Description** and specify settings.

![Image Manager window](image3.png)
8. In the Insert/Edit Image window, include an Image Description, select the Alignment and enter Dimensions, Border, Vertical Space, and/or Horizontal Space if desired.
9. Click on Insert.

This will load your image into the table. Click into the third row of the table and insert your footer in the same manner. When you are satisfied with the header and footer, you are ready to enter the text for the main content of your email. Be sure to save your template.
Image Description Field

Most ISPs have images turned off as a default setting. This means that, assuming you have included a header image, the first thing the email recipient will see is a blank field. The email has a better chance of being opened if the images are named and the recipient does not have to immediately scroll to find content.

Example of a Header image that has not been named:

![Example of an un-named header image](image1.png)

Example of a Header image that has been named:

![Example of a named header image](image2.png)

Editing Image in Email Template

To edit an image in the Email Template:

1. Click on the image and then click the Insert/Edit Image button on the toolbar.

Or right-click on the image and select Insert/Edit Image.
2. In the **Insert/Edit Image** window, make changes as desired.
3. Click **Update**.

![Insert/Edit Image Window](image)

**Inserting Table for Main Content of Email**

Now that you are ready to enter the text for the main content of the email, you first need to add another table inside the middle row of the main table.

To insert a table for the main content of your Email Template:

1. Position your cursor in the middle row between your header and footer.
2. Right-click and select **Insert/Edit Table**.

**Note**: To insert a table inside a table, you must right-click on the table. Clicking on the **Insert/Edit Table** button on the toolbar when your cursor is positioned inside a table will only allow you to edit the selected table, not add another one.
3. In the Insert Table window, under the General tab, specify the Size of the table. Enter 1 in the Columns field and 1 in the Rows.
4. Change the Width to 90%. This will create a margin.
5. In the dropdown beside Alignment, select Center from the dropdown.
6. Click on the Advanced tab to make other changes such as the border or background color.
7. Click on Insert to add the table.

You can now begin adding the main content of your Email Template into the newly inserted table.
**Editing Table in Email Template**

To edit a table in the Email Template:

1. Click on the table you want to edit.
2. Click on the **Insert/Edit Table** button on the toolbar.

3. Make the desired changes in the **Insert/Edit Table** window and click **Update**.
Adding Registrant and Sales Rep Information Tokens

The Lasso Email Template Editor allows you to insert tokens into your Email Template that will automatically pull Registrant or Sales Rep information from the database when the email is sent as a Mass Mail or directly from a Registrant’s Profile. For example, use a Registrant name token in the greeting to the email recipient so that the email will be personalized. The Tokens are accessed by clicking on the Registrant or Sales Rep buttons on the last row of the toolbar.

Note: If an Email Template that includes tokens is sent from the Communication Center, the data will not populate. The email must be sent via Mass Mail or directly from a Registrant Profile.

To add the Registrant Name Token:
1. Click into the table you created for the main content of the email.
2. Enter the greeting with which you want to begin, e.g. “Dear”, “Hello”.
3. Enter a space following your greeting and click on the Registrant button in the toolbar.
4. Select the desired option from the dropdown. Depending on how formal you want your greeting to be, you can use the Registrant First name token or the Name title and Last name tokens.
   This will insert html code, e.g. `##registrant.firstName##`, which will automatically pull the desired data from the database when you send the email.
5. Click Save.

Note: If an Email Template that includes tokens is sent from the Communication Center, the data will not populate. The email must be sent via Mass Mail or directly from a Registrant Profile.
Converting Prospects to Purchasers.

Add other tokens in the same manner. This list of **Tokens** includes:

<table>
<thead>
<tr>
<th>Sales Rep</th>
<th>Registrant</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>Name title</td>
</tr>
<tr>
<td>Last name</td>
<td>First name</td>
</tr>
<tr>
<td>Phone number</td>
<td>Last name</td>
</tr>
<tr>
<td>Email</td>
<td>Primary phone</td>
</tr>
<tr>
<td></td>
<td>Primary Address</td>
</tr>
<tr>
<td></td>
<td>Company</td>
</tr>
<tr>
<td></td>
<td>Primary email</td>
</tr>
<tr>
<td></td>
<td>Deposits</td>
</tr>
</tbody>
</table>

**Note:** The tokens populate directly from the database so if there is missing or incorrect data in the fields you have selected to include as tokens in your template, the email message will reflect this.

**Adding Specialized Tokens**

The **Specialized Tokens** button on the Email Template Editor allows you to insert the following links into your Email Template:

- **Opt-Out** – Allows an email recipient to opt out of future mailings. Please refer to the [Customizing Opt-Out Link](#) section for instruction.
- **Website Tracking** – Initiates Lasso website tracking for Registrants that already exist in the database. Please refer to Lasso’s Online Help Files or contact your Client Director for more information.
- **Web View** – Gives the email recipient the option of viewing the email in a web browser.
To add the **Web View Token**:
1. Click into the table you created for the main content of the email.
2. Position the cursor where you want your **Web View** link to appear.
3. Click on the **Specialized Tokens** button in the toolbar and select **Web View** from the dropdown.
4. In the **Create Link to Web View** window, enter the text that you want to appear in the email. For example, “View this email as a web page.”
5. Click on **Insert**.

This will place a link to a Web version of the email in your template.

6. Click **Save**.
Adding Content

To add the main content for the Email Template:

1. Ensure that you are in the table you created for the main content of the email.
2. Under the greeting, enter the text for your email.
3. Change the formatting using the buttons on the toolbar by selecting the text and then choosing from the options in the dropdowns.
   - The **Font Types** are basic fonts that all email recipients should have no trouble viewing.
   - The **Format** is defaulted to Paragraph but the dropdown contains address and heading options as well.
4. Click **Save**.

   **Note:** To apply font or formatting changes, you must click into each individual table and select the text. You cannot apply font changes to text in multiple tables at once.

---

**Email Template**

- **Type:** Email Template - General
- **Name:** Open House
- **Subject:** Join us at our Open House

---

**Note:** If you have text that has already been created in another source and choose to paste it into the Email Template, click on the **Paste from external source** button on the toolbar. Copying and pasting text from another source such as Word or Outlook may create formatting issues.
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Updating HTML Source Code

If you would like to view and/or update the HTML Source Code, click on the HTML button on the toolbar. This will bring up a Source Code window displaying the HTML code for the Email Template you have created.

At the top of the page, you will notice Undo and Redo buttons as well as buttons to Search and Replace and Format HTML code. Make desired changes and click on Update in the bottom left corner.
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Adding Hyperlinks

Adding hyperlinks to your email is simple to do and recommended if you have documents or larger images that you want the email recipient to view. Also include a link to your project website so that the recipient can immediately get more information about the project.

Linking to Project Website

To add a hyperlink to your project website:

1. In the Email Template, enter text referring to the link and then highlight the section of text where you want to position the link.
2. Click on the Insert/Edit Link button on the toolbar.
3. In the Insert/Edit Link window, enter the project website URL in the space beside Link URL.
4. In the dropdown beside Target, select Open in New Window. This will allow the project website to open in another window so that the email remains open.
5. Click on Insert.
This will place a link to your website in the email.

**Note:** To break the link, select the linked text and click on the **Unlink** button on the toolbar.
Linking to Document

To add a hyperlink to a document:

1. In the Email Template, enter text referring to the link and then highlight the section of text where you want to position the link.
2. Click on the **Insert/Edit Link** button on the toolbar.

3. In the **Insert/Edit Link** window, click on the **Browse** button to the right of the **Link URL** space.
4. In the File Manager window, select the Category or Folder where you would like the document to reside. Click on `<Project Name> Documents` if you would like other Lasso Users to be able to access the document as well.

5. Click on **Upload**.

6. In the Upload window, click on **Choose Files**, and find and select the file you want to upload. **Note**: Your file should be less than 10MB in size and valid extension.

7. When you have selected the correct file, click on **Upload to server**.
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8. You will see the uploaded document in the File Manager window. Click on the file to Preview it and then click on Insert.

9. This will take you back to the Insert/Edit Link window. You will see the URL for the document in the Link URL space.

10. In the dropdown beside Target, select Open in New Window. This will allow the file to open in another window so that the email remains open.

11. Click on Insert.
Converting Prospects to Purchasers.

This will place a link to the document in the email.

```
Email Template
Type:       Email Template - General
Name:       Open House
Subject:    Join us at our Open House

Dear ##registrant.firstname##,

We are pleased to invite you to attend our Open House on Saturday, April 4th, to celebrate the completion of the first phase of Pebble Creek. To find out more, please have a look at Pebble Creek's website. For an artist's rendering of the completed community, click [Pebble Creek Artist Rendering].

Attend our Open House on April 4th to view the completed first phase of Pebble Creek.

View this email as a web page.
```

Note: To break the link, select the linked text and click on the Unlink button on the toolbar.
Linking a Thumbnail Image to a Larger Image

You may have an image that is too large to include in the email. To incorporate the image into the template, you can insert a reduced-size version called a Thumbnail and link it to the larger view so that, when clicked on, the full image will be displayed.

To add a link from a Thumbnail image to a larger image:

1. If your image has not already been uploaded to the Image Manager, do this first. Please refer to the Inserting Images section of this guide for instruction.
   
   **Note**: When an image is added to the Image Manager, a thumbnail image is automatically created at the same time.

2. Position your cursor where you want your linked image to appear.
3. Click on the Insert Image button on the toolbar.

4. Click on the Thumbnails folder in the Image Manager.
5. Click on the Thumbnail image that you want to insert.

6. This will insert the Thumbnail image into your template. Click on it and then click on the Insert/Edit Link button.
7. Click on the **Browse** button to the right of the **Link URL** space.

8. In the **File Manager** window, click on the folder that contains the full image and select the file.
9. Click **Insert**.
10. This will take you back to the **Insert/Edit Link** window. You will see the URL for the document in the **Link URL** space.
11. In the dropdown beside **Target**, select **Open in New Window**. This will allow the file to open in another window so that the email remains open.
12. Click on **Insert**.

When the email recipient clicks on the image in the email, the full image will open up in a new window.
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Linking an Image to a Document

You may want to link an image to a document, such as a floor plan in PDF format.

To add a link from an image to a document:

1. In the template, click on the image that you want to link to a document, and then click on the Insert/Edit Link button on the toolbar.

2. Click on the Browse button to the right of the Link URL space.
3. In the **File Manager** window, select the **Category** or **Folder** where you would like the document to reside. Click on `<Project Name> Documents` if you would like other Lasso Users to be able to access the document as well.

4. Click on **Upload**.

5. In the **Upload** window, click on **Choose Files**, and find and select the file you want to upload.

6. When you have selected the correct file, click on **Upload to server**.
Converting Prospects to Purchasers.

7. You will see the uploaded document in the **File Manager** window. Click on the file to **Preview** it and then click on **Insert**.

![File Manager Window](image)

8. This will take you back to the **Insert/Edit Link** window. You will see the URL for the document in the **Link URL** space.

9. In the dropdown beside **Target**, select **Open in New Window**. This will allow the file to open in another window so that the email remains open.

10. Click on **Insert**.

![Insert/Edit Link Window](image)

When the email recipient clicks on the image in the email, the document will open up in a new window.
Previewing Your Email Template

To see what your Email Template will look like to the recipients, either click on the Preview button in the toolbar,

OR, on the Email Templates main page, click on the magnifying glass beside the Name of the template.

The Preview will display the email with examples in place of any Tokens.
You can also see what your Email Template will look like on the Web. To do this, click on the Web Preview button above the template:
Testing Your Email Template

It’s important to test your Email Template to see how it will look in various browsers and email clients, and ensure that all links are working:

- Validate the HTML code. Ensure that links and code aren’t broken.
- Test your email in various browsers and email clients. Set up free accounts with Hotmail, Gmail, Yahoo, etc. and test. You’ll see what potentially could land in junk mail as well as how it renders with other ISPs and email clients such as Outlook.
- Most ISPs have images turned off as a default so email recipients will likely not see the images in your email until they choose to display them. Ensure that the message can still be understood with images turned off.
To test your Email Template:

1. In your template, click on Test Email List.

   ![Test Email List](image)

   Attend our Open House on April 4th to view the completed first phase of Pebble Creek

   View this email as a web page.

   ```
   Dear #=registrant.firstName#,
   
   We are pleased to invite you to attend our Open House on Saturday, April 4th, to celebrate the completion of the first phase of Pebble Creek.
   
   To find out more, please have a look at Pebble Creek’s website. For an artist’s rendering of the completed community, click Pebble Creek Artist Rendering.
   
   Many of our units are already sold but there are a few one-bedrooms still available. The floor plan is below.
   
   ![Floor Plan](image)
   
   #=salecrap.firstName# #=salecrap.lastName#
   
   Your Pebble Creek Representative
   ```

2. In the spaces provided, enter your test email addresses. You may enter up to ten.

   **Note:** Once you’ve entered your test email addresses, they are saved for testing any templates you create in the future, and can be edited, removed, or added to as needed.

3. Click Save.
4. Click on **Send Test**. Your email will be delivered to the test email addresses you entered.

Attend our Open House on April 4th to view the completed first phase of Pebble Creek

`View this email as a web page.`

Dear **#registrant.firstname**,

We are pleased to invite you to attend our Open House on Saturday, April 4th, to celebrate the completion of the first phase of Pebble Creek.

To find out more, please have a look at Pebble Creek’s [website](#). For an artist’s rendering of the completed community, click [Pebble Creek Artist Rendering](#).

Many of our units are already sold but there are a few one-bedrooms still available. The floor plan is below. Click on it to view a larger image.

![Floor Plan](#)

**#salesrep.firstname** **#salesrep.lastname**

Your Pebble Creek Representative
Examples of Received Email

Here is an example of what an Email Template might look like to the recipient who has images turned on.

🌟 Jane Smythe jsmythe@mylasso.com to me

Attend our Open House on April 4th to view the completed first phase of Pebble Creek.

Dear John

Registrant First Name automatically populated via Basic Tokens

We are pleased to invite you to attend our Open House on Saturday, April 4th, to celebrate the completion of the first phase of Pebble Creek.

To find out more about Pebble Creek, please see our website at [http://www.pebblecreek.com](http://www.pebblecreek.com).

For the artist’s rendering of the completed community, click [Pebble Creek Artist Rendering pdf].

Many of our units are already sold but there are a few one-bedrooms still available. The floor plan is below. Just click on it to view a larger image.

Your Sales Team at Pebble Creek

Note: The Opt-out link will only appear if you send a Mass Mail. It will not appear on an email sent from an individual Registrant Profile.

OR

Many of our units are already sold but there are a few one-bedrooms still available. The floor plan is below. Just click on it for a printable version.

Your Sales Team at Pebble Creek
Converting Prospects to Purchasers.

When the recipient mouses over an image, the name you gave it in **Image Description** field will be displayed.

Here is an example of what the same email will look like to the recipient whose images are turned off:
Using the Template Library

Lasso provides you with a variety of Email Templates which you can use as a base to build your own. These templates are already formatted with text and images that you can adjust to suit your particular needs.

There is a general template available along with templates for the following:

- Announcement
- Newsletter
- Project Information
- Company Update
- Sales Center Opening

To use the Template Library:

1. In the Templates screen, click on Template Library.

2. To preview a template, click on the Preview button.
   
   **Note:** To view only the templates in a specific category, click on the appropriate category under Filter By Tags.

3. You will need to add the template to an existing folder. If you need to create a new folder, do so before you proceed. Remember that if you copy the template to a Private folder, only you will have access to it. If you copy it a Public folder, other Lasso Users on the project will also have access. Please refer to the section on Adding an Email Template Folder for more information.
4. Once you’ve selected your template, the Preview screen will come up.

Note: Basic Template with a Preheader is recommended.

5. Beside Copy to My Templates, click on the Choose Destination dropdown to select the folder in which you want the template to reside.

6. You will see the My Templates text change to the folder name you chose. Make sure this is the folder you want to copy the template to. For example, if you selected the Events folder, the text will read Copy to Events.

7. Click on the Copy to button.

8. Click on the X to close the Preview window and return to the Template Library.

9. Click on the Back button to return to the Templates screen. You will see the new template listed in the folder you chose.
10. Click on it to open, edit as desired, and save.
IMAGE MANAGER/FILE MANAGER

Adding Folder in Image Manager or File Manager

To add a folder in the Image Manager or File Manager window:

1. In an Email Template, click on the Insert Image button in the toolbar to go to the Image Manager and the Insert File button to go to the File Manager.

2. In the Image Manager or File Manager, click on Create folder. You can toggle between Image Manager and File Manager by clicking in the top right manager button.

3. In the Create folder window, enter a name for your folder in the space provided.
4. Click Create.
5. Your newly created folder will be displayed under **Folders**. Click on it to select.

---

**Uploading Images to Image Manager**

You may want to preload your images into the **Image Manager** so that they are ready to use when needed.

To add an image to the **Image Manager**:

1. In an Email Template, click on the **Insert Image** button on the toolbar. This takes you to the **Image Manager**.

2. In the **Image Manager**, select the **Category** or **Folder** where you would like the image to reside. Click on **My Images** if you are the only one who needs access to the image. Click on `<Project Name> Images` if you would like other Lasso Users to be able to access the image as well.

   **Note**: The top bar of the **Image Manager** tells you which **Category** and **Folder** you are in.
3. Click on **Upload**.

4. In the **Upload** window, click on **Choose Files**, and select the file containing the image you want to upload. **Note**: You may select multiple files at one time.

5. When you have selected the correct file(s), click on **Upload to server**.
Converting Prospects to Purchasers.

You will see the uploaded image(s) in the Image Manager window.

Uploading Files to File Manager

You may want to preload your files into the File Manager so that they are ready to use when needed.

To add a file to the File Manager:

1. In an Email Template, click on the Insert File button on the toolbar. This takes you to the File Manager.

2. In the File Manager, select the Category or Folder where you would like the file to reside. Click on My Documents if you are the only one who needs access to the file. Click on <Project Name> Documents if you would like other Lasso Users to be able to access the file as well.

   Note: The top bar of the File Manager tells you which Category and Folder you are in.

3. Click on Upload.
4. In the **Upload** window, click on **Choose Files**, and select the file you want to upload.

**Note:** You may select multiple files at one time. Each file should be less than 10MB in size and valid extension.

![Choose Files](image)

5. When you have selected the correct file(s), click on **Upload to server**.

![Upload to server](image)

You will see the uploaded file(s) in the **File Manager** window.

![File Manager](image)
Editing or Deleting Image in Image Manager

To edit or delete an image in the Image Manager:

1. In the Image Manager, click on the arrow in the footer of the image you want to edit or delete.
2. Click on Edit or Delete in the dropdown.

**Warning:** If you delete an image, make sure you have first changed all links to that image in Email Templates.

Deleting File in File Manager

To delete a file in the File Manager:

1. In the File Manager, select the file you want to delete.
2. Click on the Delete tab.

**Warning:** If you delete a file, make sure you have first changed all links to that file in Email Templates.
SPECIALIZED EMAIL TEMPLATES

About Specialized Templates

The Specialized Templates folder is for creating Opt-In and Opt-Out Templates only. Do not use this area to create general Email Templates. When you click on the Specialized Templates folder and New Templates, you will see a field called Type which will allow you to select from several types of Opt-In and Opt-Out templates. Once you make your selection, you can customize the Specialized Template with project logos, text, etc.

Specialized Templates include:

- **Email Template - Opt-In (Default)** – Used for opting-in online and manually entered Registrants, and can also be used when importing Registrants. Only one Opt-In Default Template is created per project, and this template is needed to opt in an opted-out Registrant. Once a customized template is created for this default, it will no longer appear in the dropdown list of specialized templates.

- **Email Template - Opt-In** – Used for mass mailing to a custom list of Non-Opted Registrants. For example, a custom Opt-In Template can be created that may include customized elements applicable to the attributes of a specific Registrant list. Multiple Opt-In Templates can be created.

- **Content Block - Opt-Out** – Unsubscribe/Opt-Out Content Block that is attached to all mass mails. If a Custom Block has not been created, Lasso automatically attaches a default. Once a customized template is created for this default, it will no longer appear in the dropdown list of specialized templates.

- **Subscription Page - Thank you (Opt-In/Opt-Out Confirmation for single project)** – Registrants would see this page after selecting their opt-in/opt-out preference regarding further mass mail communication for a specific Project. The page should indicate that the Registrant’s profile has been updated in Lasso. Once a customized template is created for this default, it will no longer appear in the dropdown list of specialized templates.

- **Subscription Page - Landing (Opt-In/Opt-Out Confirmation for multiple projects)** – Registrants would see this page after selecting their opt-in/opt-out preference regarding further mass mail communication for multiple Projects. The page should indicate that the Registrant’s profile has been updated in Lasso. Registrants would have the ability to opt in to all projects to which they are currently assigned.

- **Subscription Page - Error (Opt-In Error)** – If Registrants try to opt in twice, an error page will appear.

- **Subscription Page - Opt-Out Verification (Opt-Out Verification unsubscribe)** – Registrants would see this page when they click the Opt-Out/Unsubscribe link confirming that they want to opt out of future mass mail communication.
Customizing Opt-Out Link

For compliance with the CAN-SPAM Act in the United States and FISA (Fighting Internet and Wireless Spam Act) and PIPEDA (Personal Information Protection and Electronic Documents Act) in Canada, when you send a Mass Mail from Lasso, it automatically includes a link to allow an email recipient to opt out of receiving future emails.

To the email recipient, the Lasso default Opt-Out link appears at the bottom of the email and looks like this:

    About this email: Our records indicate that you would like to receive updates.
    If you would no longer like to receive these updates, please use this link.

If you would like to customize this link, you can access it in the Specialized Templates folder. Please refer to the section on Specialized Templates for more information about the templates available in this area of Lasso.

To customize the Opt-Out link:

1. In the Email Templates screen, click on the Specialized Templates folder.

2. Click on New Template. (Be sure you are in the Specialized Templates folder.)

3. In the Type field, select Content Block - Opt-Out from the dropdown and click on Next Step.
4. Click Next Step above or below Type.

5. Enter a name for the custom Opt-Out in the Name field.

6. Click into the template. Enter text that you want to appear with the Opt-Out link.

7. Position your cursor where you want the Opt-Out link to appear and click on the Specialized Tokens button in the toolbar.

8. Select Opt-Out from the dropdown. (Once a customized template is created for this default, it will no longer appear in the dropdown list of specialized templates.)

9. In the Link Name window that comes up, in the space provided, enter the text that you want the link to read. For example, you may want it to say “To unsubscribe from future updates...”.

10. Click on Insert.
This will place an **Opt-Out** link in the email.

11. **Click Save** when you are done.

The custom Opt-Out template you create will replace the default Opt-Out template and will automatically be attached to every Mass Mail. For an example of what the email would look like sent as a Mass Mail with a custom Opt-Out link, see the [Examples of Received Email](#) section.
Creating an Email Template with an Opt-In Link

There are two types of Opt-In Email Templates that can be created – the Email Template - Opt-In (Default) and the Email Template - Opt-In. The Default Opt-In is used to opt in online and manually entered Registrants while the other Opt-In is used for sending to custom lists of Registrants via Mass Mail.

Opt-In Email Templates are accessed in the Specialized Templates folder. Please refer to the section on Specialized Templates for more information about the templates available in this area of Lasso.

To create an Email Template with an Opt-In link:

1. In the Email Templates screen, click on the Specialized Templates folder.

2. Click on New Template. (Be sure you are in the Specialized Templates folder.)

3. In the Type field, from the dropdown, select:
   a) Email Template - Opt-In if you want to create an Opt-In template to send to a custom list via Mass Mail. You can create multiple Opt-In templates for sending to lists of Registrants with different attributes.
   b) Email Template - Opt-In (Default) if you want to create an Opt-In that is sent out automatically to all Online Registrants. Once this template is created, it can also be used to opt-in Registrants that are entered manually as well as Registrants that are imported.

   Note: Once a customized template is created for the default template, it will no longer appear in the dropdown list of specialized templates.

4. Click Next Step above or below Type.
5. Enter the following information in the spaces provided:
   a) **From Name** – Sales Rep name that is to appear in the *From* email address of the sent email.
   b) **From Email** – Address that is to appear as the *From* email address of the sent email.
   c) **Name** – Name of template
   d) **Subject** – Subject of template

   **Note:** If you selected Email Template – Opt-In (Default), there will also be a checkbox allowing you to Send From Primary Rep assigned to each Registrant.

6. Click into the template. Enter the text that you want to appear with the **Opt-In** link.

   **Image:** Email Template

   7. Position your cursor where you want the **Opt-In** link to appear and click on the **Specialized Tokens** button in the toolbar.

   8. Select **Opt-In** from the dropdown.

   9. In the **Link Name** window that comes up, in the space provided, enter the text that you want the link to read. For example, you may want it to say **Subscribe here**.
10. Click on **Insert**.

This will place an **Opt-In** link in the email.

11. Click **Save** when you are done.
EMAIL TEMPLATE GUIDELINES

**Design**

- Design for the email preview pane. Keep email width to a maximum of 650 pixels.
- Make sure your key elements such as logo, call-to-action, and primary subject matter are placed above the fold, meaning in the top half of a monitor or the first 300 pixels.
- Include an even balance of images and text. The email campaign that is sent as one large image tends to end up in a Junk folder.
- Keep your message short. Don’t overload your email with content. Use it as a tool to drive recipients to your website or landing page. Most people prefer to read large amounts of text in a web browser as opposed to their inbox. Give them a taste and a “Read more here…” link.
- Keep it simple. Don’t try and design a complex html masterpiece and expect everyone to see it the same way you do. The more difficult your email is to code, the more difficult it will be to see across the various email clients.
- Use tables. Designing with tables is the only consistent way to have your design rendered correctly across multiple email browsers.
- Give your recipient the option of viewing the email in a web browser. Often, even after every step is taken to ensure proper design, an email client will mangle an email. Make this a text link at the top of every email.
- Don’t use Javascript or other dynamic scripts. Even if a SPAM filter happens to let your email through untouched, most email clients will not allow these scripts to function.
- Don’t use Flash, Quicktime, Windows Media, etc. By default, the ability to view these rich media platforms in email is turned off in most email clients. Provide a link to view your rich media on a custom landing page.
- Avoid the use of Cascading Style Sheets (CSS). It can cause incorrect rendering and some ISPs strip away the code.
- Keep it legal. Ensure that you are following Can-Spam Compliance or any specific Email Marketing Act that is specific to your region.
Subject Lines take first place. Without an accurate and compelling Subject Line, the chances of your email being viewed are very low. Give people a reason to open your email by branding your subject line and by highlighting the most important part of your message. Anything longer than 55 characters (and spaces do count) will get cut off for many recipients. A character count of 35 really is a better number to aim for. Finally, test at least two subject lines to a portion of your list before selecting one to send to the majority of your recipients.

The Subject and the From lines are instant recognition and value. If the Registrant doesn’t immediately recognize the WHO and the WHAT, then your email campaign might as well have not been sent.

Avoid words in upper case, and don’t use excessive exclamation marks, question marks, or special characters.

Avoid gimmicky phrases like “Act Now”, “Special Clearance”, or even “Click here” in your emails. Spam filters look for these key words when diagnosing a potentially unsafe email. If you need to use them, put them in a graphic.

Avoid using background images and colors as most email applications (AOL, Gmail, Hotmail, Outlook) disable them. This could be a problem if there is white text on a dark background.

Most ISPs, by default, block images so don’t use them for important content such as headlines, links, or call-to-action. Or if you do, make sure there is an HTML backup.

Use alt text for your images. If you’ve titled the image, the recipient can at least read what the image is without seeing it.

Use image widths and heights. This way your design will maintain its basic structure when images are turned off.

Ensure that your images are no larger than 400 pixels. Use pixels to define width and height instead of percentage to prevent the design components from fluctuating with the recipient’s window size.

Make sure your image file sizes are as small as you can get without losing their visual integrity. Large images should be cut up into smaller, more downloadable sizes. No one wants to wait 10 seconds to see your 100kb jpeg.

Use absolute paths. Host images on your website or let your email service provider host them for you. Then make sure your image paths are absolute and point to the full URL: (http://www.yourwebsite.com/yourimage.jpg).

Validate the HTML code (ensure that links and code aren’t broken).

Test your email in various browsers and email clients. Set up free accounts with Hotmail, Gmail, Yahoo, etc. and test. You’ll see what potentially could land in junk mail as well as how it renders with other ISPs and email clients such as Outlook.

Most ISPs have images turned off as a default so email recipients will likely not see the images in your email until they choose to display them. Ensure that the message can still be understood with images turned off.
Sending Email

- Always send from the same email address using a project or corporate email address.
- Ask to be put in the recipient’s safe list (refer to Lasso’s document with instructions on white-listing).
- Always include a means to unsubscribe in the email.
- How often you email your list plays a role in your reputation. Don’t over email. If you send email too often, recipients are likely to hit the spam button to stop the deluge of messages. If you send email too infrequently, your Registrants may forget who you are!
- Be consistent. Send from the same sender and try to send at the same time each week or month. Tuesday to Thursday have traditionally been good times to send email; however, don’t be afraid to test on weekends or on Fridays. Some have found that since Fridays are sometimes quieter days, it can be a good time to send. Weekends can be positive too as this is when a prospect may have more time available to read your email.
- Confirm that your sending domain has been authenticated. Email authentication sets the stage for improved delivery and defines who can send email for a specific domain – it’s not the silver bullet that will instantly increase your success. A holistic approach combining authentication, reputation, relevancy and marketing strategy is more important than ever to ensure positive results. Authentication is key but you must send targeted messages with content that relates to your audience in a consistent and responsible manner.
- Use Spam-evaluation services if your email service provider offers them. There are many free services you can use such as SpamAssassin.
- Keep it legal. Ensure that you are following Can-Spam Compliance or any specific Email Marketing Act that is specific to your region.