SELF SERVE REGISTRANT UPDATES

About Self Serve Registrant Updates

Self Service Registrant Update (SSRU) is an advanced feature located in the **Project Administration Center** that allows clients to create custom questions and send these questions in the form of a landing page to Registrants via email. Additionally, Registrants can be sent their profile information to update in real time.

This is a great way of staying in touch with Registrants, gathering up-to-date contact details, confirming interest level, and segmenting lists. A SSRU can even be used for registration of upcoming events.

Once your **SSRU** has been created, it is sent in the same manner as other email templates either as a Mass Mail or from the individual Registrant screen in the **Sales Center**. Before you send the email template containing the **SSRU** to all Registrants selected, **TEST it first**! Send it to yourself or a test group within your office.

After the mail has been sent, the **Self Serve Registrant Updates** section in the **Registrant Profile** will show you how many times the Registrants have logged onto the **SSRU** (or clicked on the link). In the **Question** section of the **Registrant Profile**, you'll be able to see how the questions in the **SSRU** were answered by the Registrant.

Best Practices and Helpful Hints:
• Keep the questions brief and limit the number.
• Test the questions and responses with others. It's important to get others' perspectives.
• Only include the profile information that is really pertinent. It's great to have complete details but save that for another time. Registrants will be overwhelmed if they have to complete too much information.
• If you're using this to track event registration, create two custom lists based on the Question responses (e.g. one for "Yes, I'll attend" responses and another for "No, I'm not able to attend" responses). As Registrants respond, they will be automatically filtered into the appropriate list. No need to keep an additional list. You'll even be able to run a list to determine all those Registrants who haven't responded yet.

See:

- Accessing Self Serve Registrant Update Set-Up
- Adding Self Serve Registrant Update
- Creating Email Template containing Self Serve Registrant Update Link
- Testing Your SSRU Email Template
- Sending Email Template containing Self Serve Registrant Update
- About Self Serve Registrant Updates - Login Text
- Basic Principles of Designing an Email Template

Steps to Creating and Sending a Self Serve Registrant Update

Client Administration Center:
Set up Self Serve Registrant Update Questions in the Question Center

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Project Administration Center:
Add the Self Serve Registrant Update under Project Setup

↓

Sales Center:
Create an Email Template containing a Self Serve Registrant Update link under Marketing – Email Templates

↓

Sales Center:
Pull a test group of Registrants and test the Self Serve Registrant Update

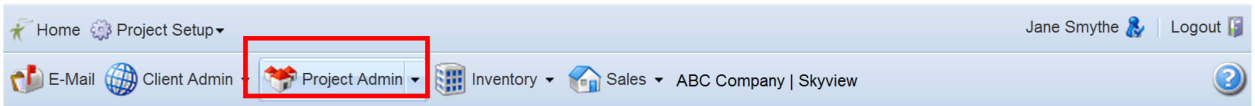
↓

Sales Center:
Pull a list of Registrants and send the Self Serve Registrant Update

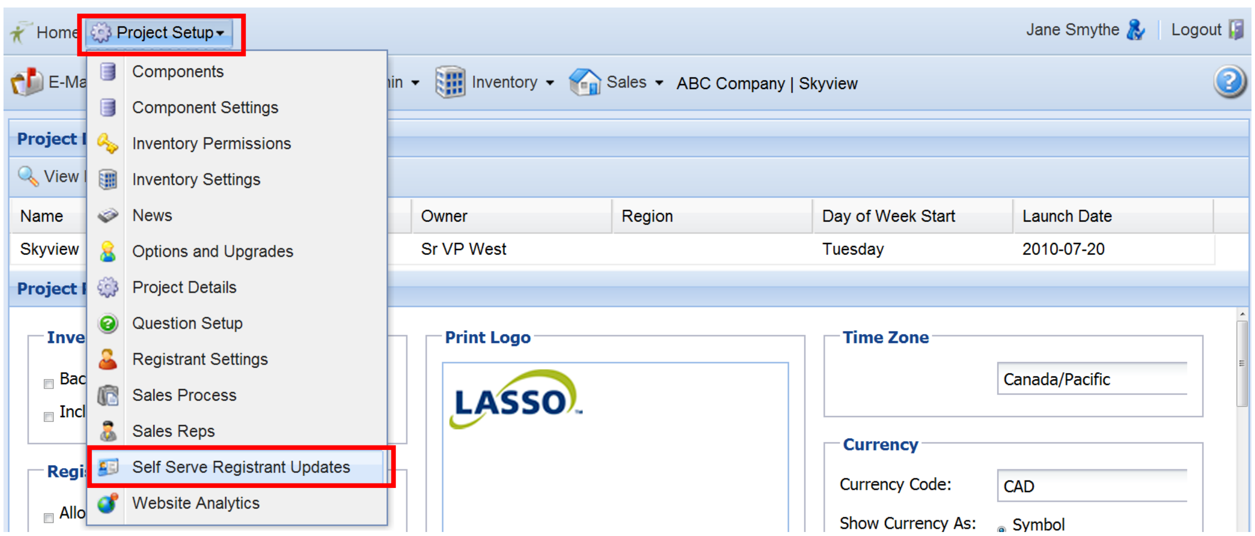
Accessing Self Serve Registrant Update Set-Up

To access Self Serve Registrant Update Set-up:

1. Click into the Project Administration Center  .



2. Click on **Project Setup** and select **Self Serve Registrant Update** from the dropdown.



Note: You must have a Project Administrator Role and Self Serve Registrant Updates Permissions to access this area.

Adding Self Serve Registrant Update

Prior to adding a **Self Serve Registrant Update (SSRU)**, you will need the following:

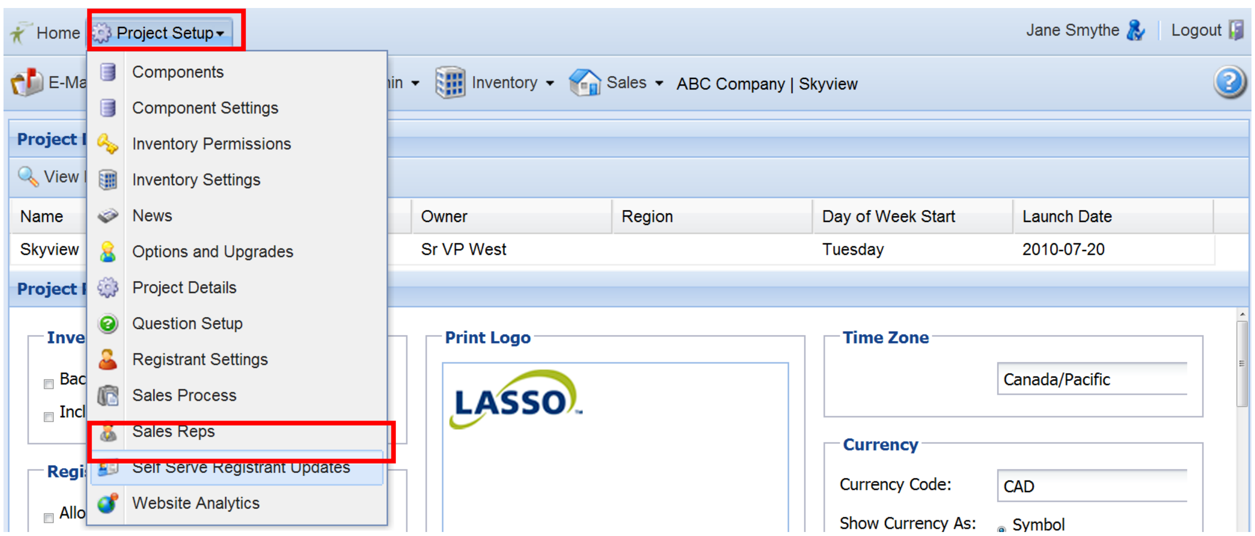
• **A URL page to direct Registrants after completing the profile/question update** (e.g. a thank you page on your web site). If you don't include this, the Registrants will be directed to a Lasso Thank You page.

• **Questions set up in Question Center** - This is done in the Administration Center.

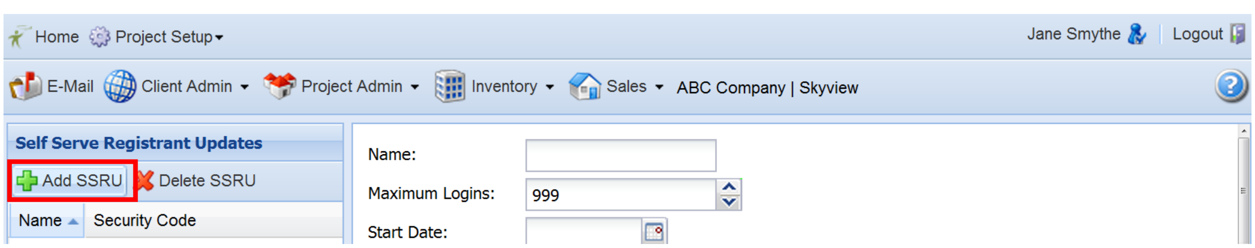
• **HTML text for a Header and Footer to enhance the look of the SSRU profile/question page** - This can be done in the Sales Center using the **Email Template** functionality under the **Marketing** tab. Create the Header and footer and cut and paste the HTML text. Alternatively, an HTML editor such as Dreamweaver can be used. Any images used must be hosted on a web site.

Once the above is completed, you are ready to create the **Self Serve Registrant Update**. To add an **SSRU**:

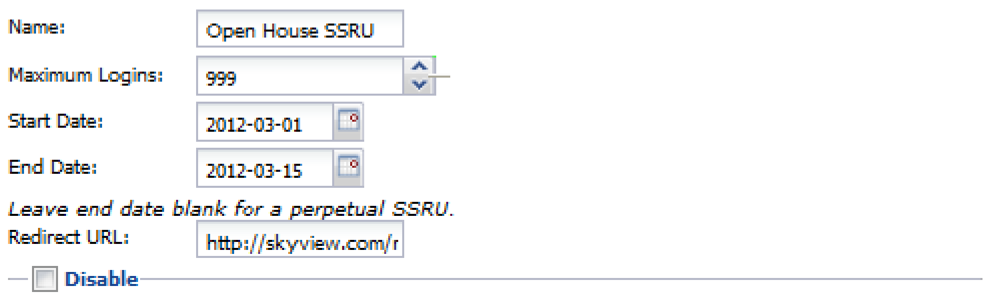
1. In the Project Administration Center, click on **Project Setup** and select **Self Serve Registrant Update** from the dropdown.



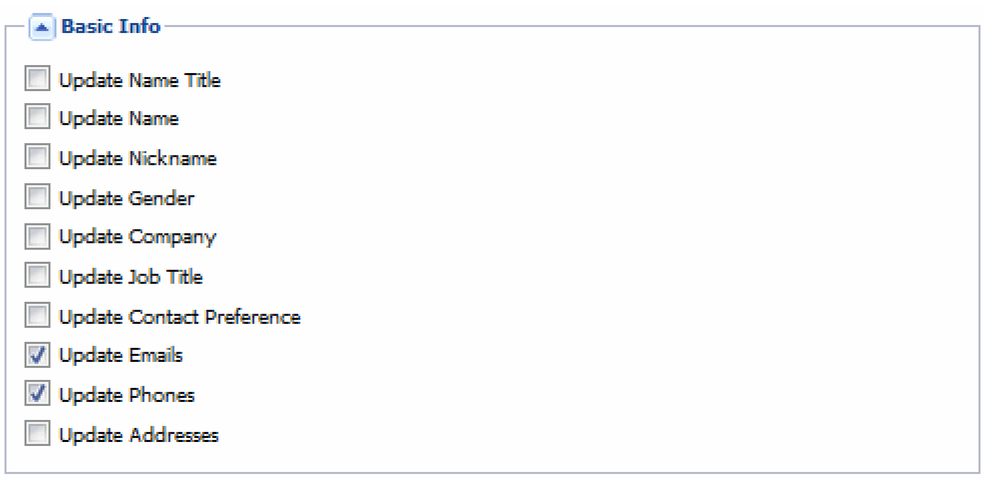
2. Click on **Add SSRU**.



3. Complete the information in the spaces provided on the right side of the screen.
   Name - Create a name for the SSRU.
   Start Date - Select the date that you would like to begin accessibility to the SSRU.
   End Date - Leave this blank if you'd like the SSRU to be perpetual. Otherwise, select a date that you would like it to end.
   Redirect URL - Cut and paste the URL that Registrants should be directed to when they have completed the form. This URL should thank the Registrants for updating their profile.
   Disable - Check if you want to halt the accessibility of the SSRU. Unchecking Disable will grant access to the SSRU again.



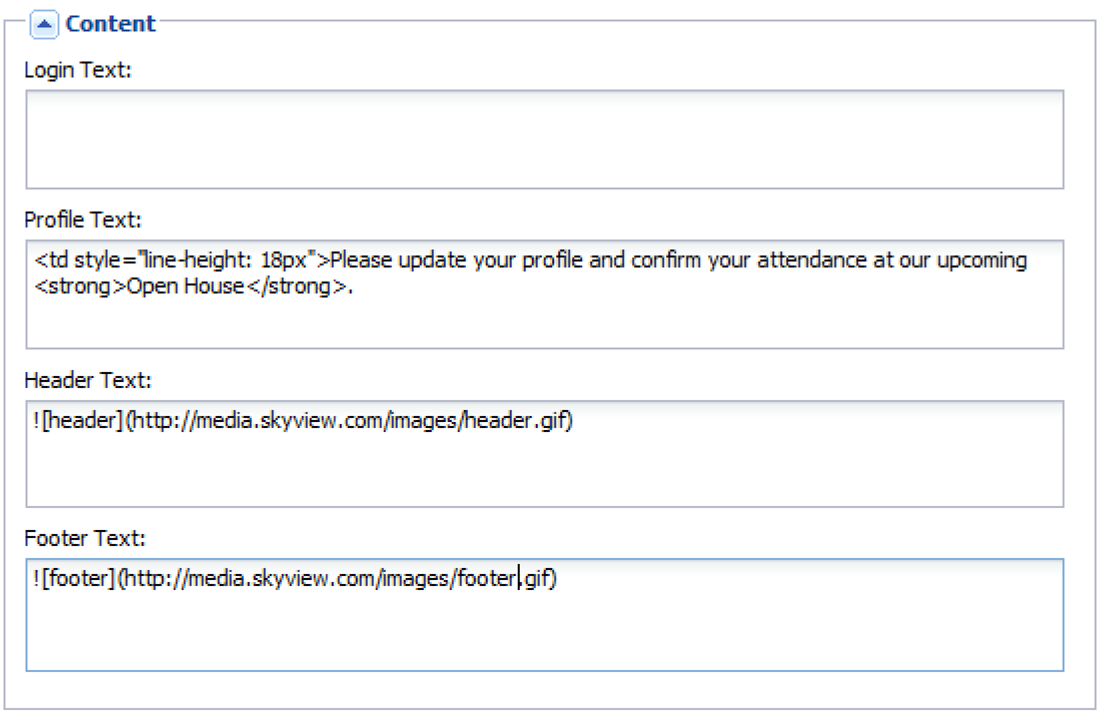
Basic Info - Check the boxes that you would like the Registrant to update.



Questions - Check the questions that you would like the Registrant to answer on the SSRU. Remember the questions must be created in the **Question Center** prior to creating the SSRU.

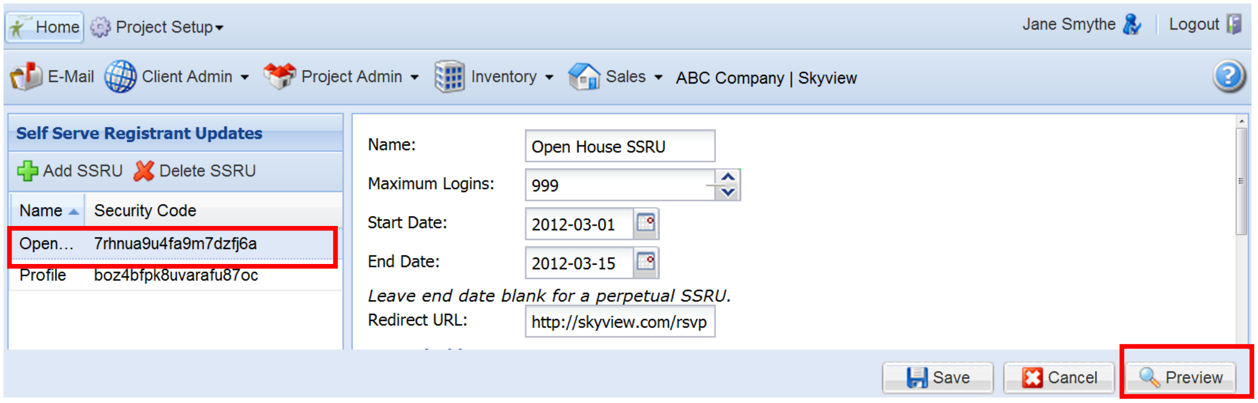
Login Text, **Profile Text**, **Header Text** and **Footer Text** require **HTML code**. Cut and paste HTML code into each text box.

Login Text - This is a message that will appear below the login box *if* the Registrant enters their login incorrectly. For more information, see About Self Serve Registrant Update Login Text.
Profile Text - This text will appear just above the Profile information.
Header Text - This will appear at the top of the page (usually a banner logo).
Footer Text - This will appear at the bottom of the page.

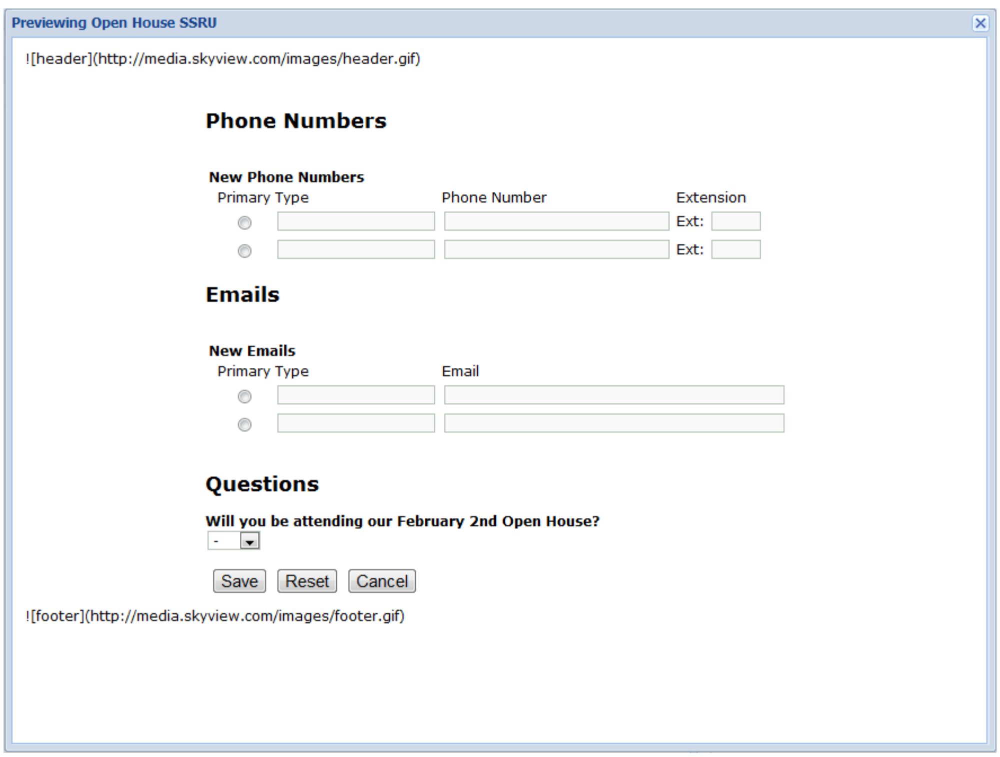


4. Click **Save**. This will add to the list under **Self Serve Registrant Updates** on the left of the SSRU screen.

5. Select the SSRU and click **Preview** in the bottom right corner to see what it will look like to your Registrants.



Example of SSRU Preview:



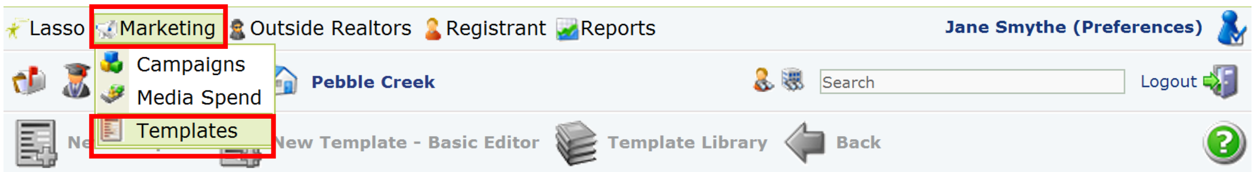
6. The next step is to create an email template that contains a hyperlink to the SSRU. See Create Email Template containing Self Serve Registrant Update Link.

Creating Email Template containing Self Serve Registrant Update Link

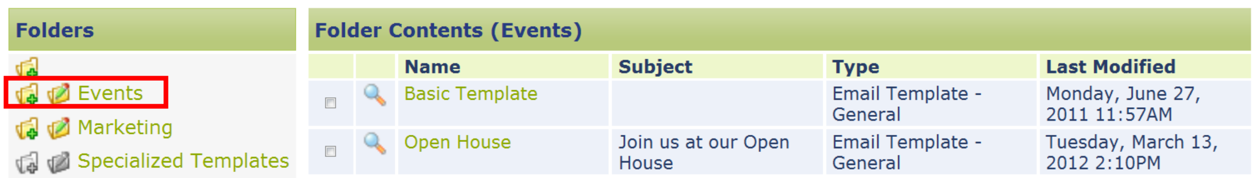
Please refer to the Basic Principles of Designing an Email Template before you begin. Detailed instruction is on creating an email template is available in the **Email Template Guide**.

To create an email template containing a **Self Serve Registrant Update Link**:

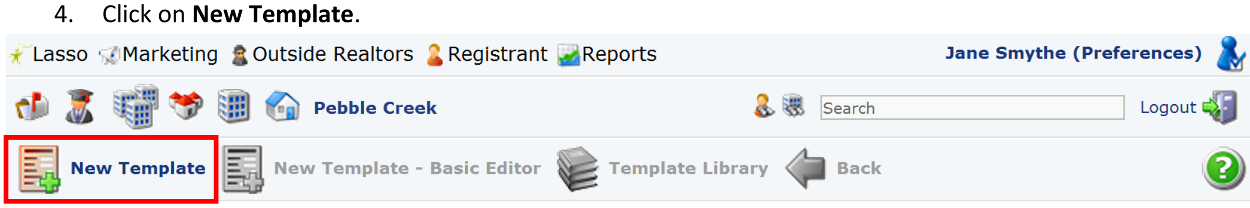
1. Click into the **Sales Center** .
2. Hover over **Marketing** and click on **Templates** in the dropdown.



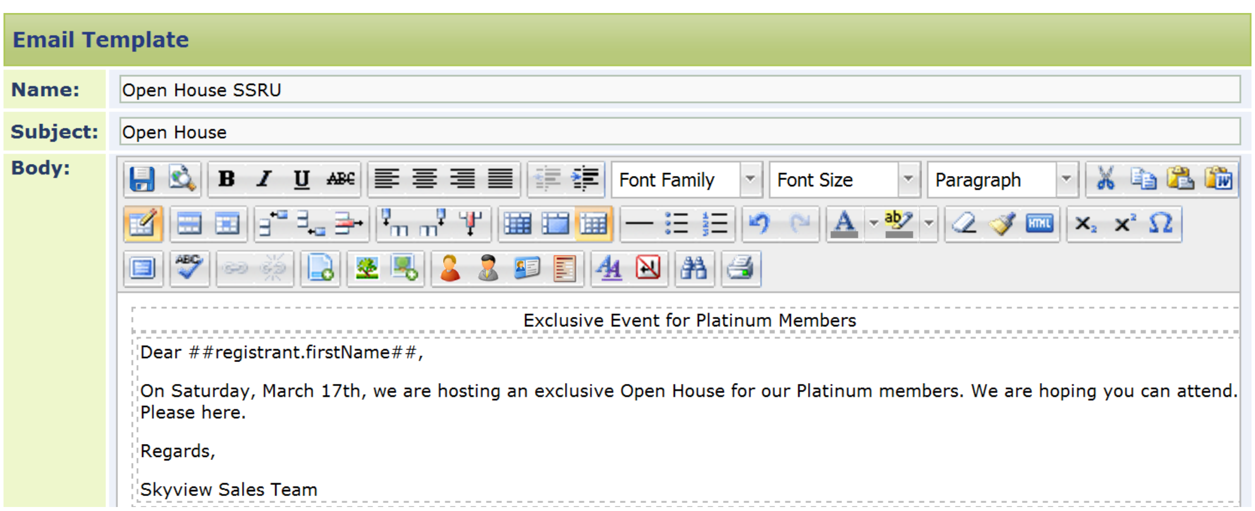
3. Click on the folder in which you would like to create the email template.



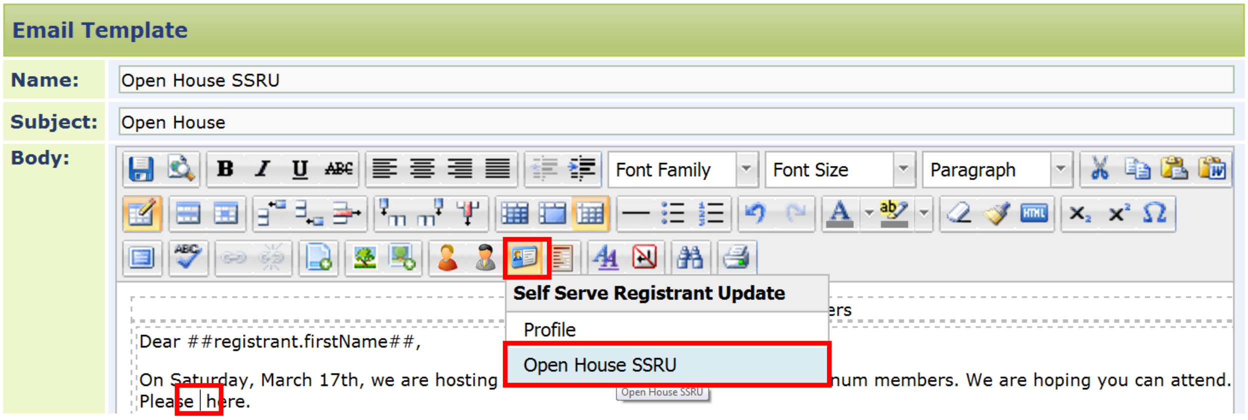
4. Click on **New Template**.



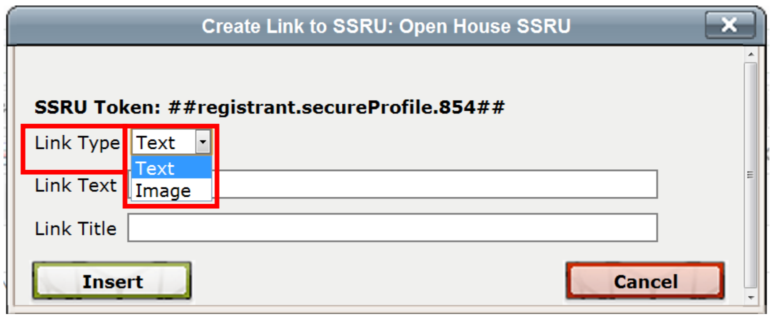
5. This brings you to the **Add Template** Complete the fields as follows:
   a) **Name** – Enter a name for your email template. This is the name that will show in the list of Folder **Contents**.
   b) **Subject** – Enter a subject for the **SSRU**. This will show in the **Subject** line of your email to the recipient.
   c) **Body** – Add the content for the email.



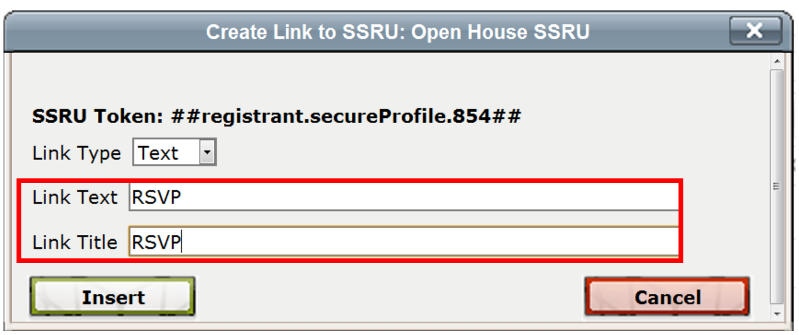
6. Position your cursor where you want the SSRU link to be placed and click on the **Self Serve Registrant Update** button on the toolbar. In the dropdown, click on the appropriate SSRU link.



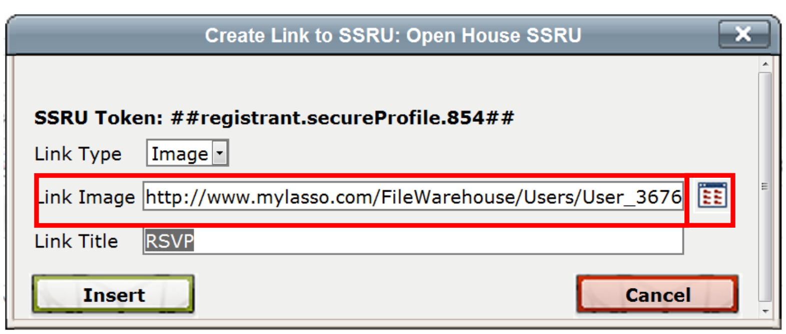
7. In the **Create Link to SSRU** window, beside **Link Type**, select **Text** or **Image** from the dropdown.



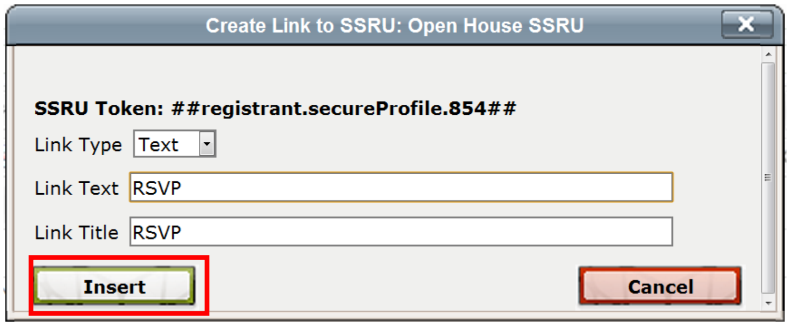
a) If you selected **Text**, beside **Link Text**, enter the text that you want email recipients to see.



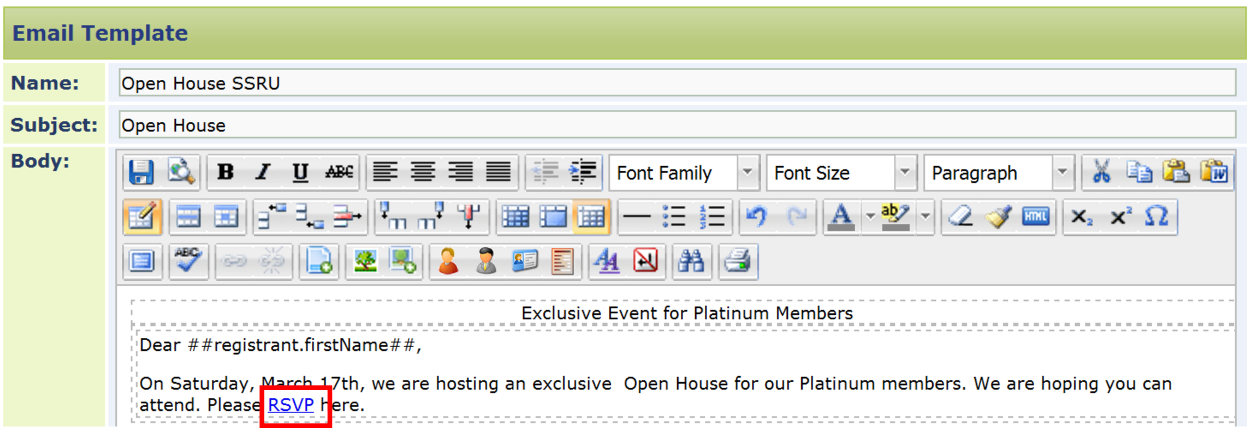
b) If you selected **Image**, beside **Link Image**, click on the **Browse** button and select your image from the **File Manager**. (Refer to the **Email Template Guide** for detailed instruction on how to add images.)



8. Enter a name for the link in the **Link Title** space.
9. Click on **Insert**.



10. Your SSRU link will now appear in your template. Complete the rest of content for the email.



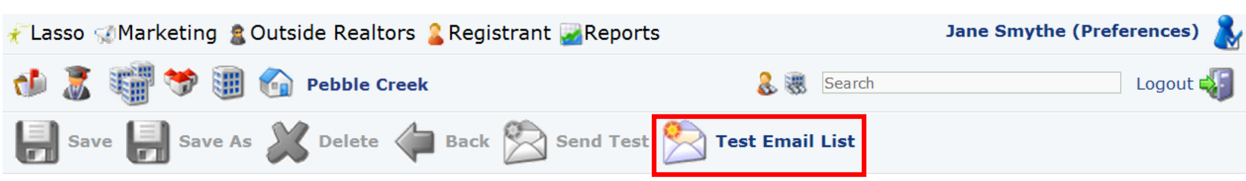
11. Click **Save**. You are now ready to test and send your **SSRU**.

Warning: If you copy an Email Template's Source Code from one Project and paste it into a new template in another Project, some links may be broken. For example, the SSRU link that carried over with the Source Code will point to the original project's SSRU, which the Registrants will not be able to view. It will be necessary to recreate all links and associations.

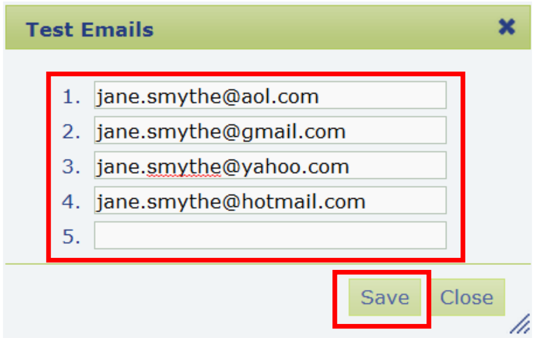
Testing Your SSRU Email Template

To test your SSRU Email Template:

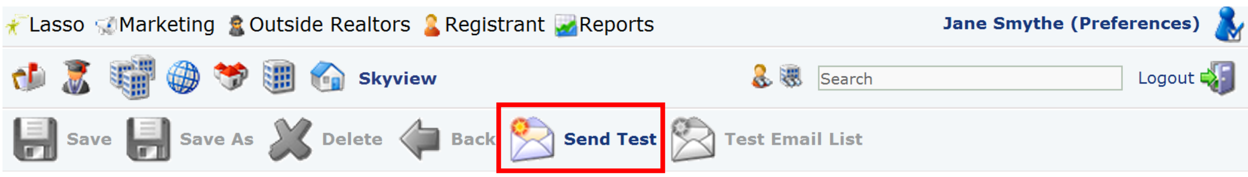
1. In your template, click on **Test Email List**.



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



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



5. Review your test email and click on the SSRU link to make sure it is working correctly.

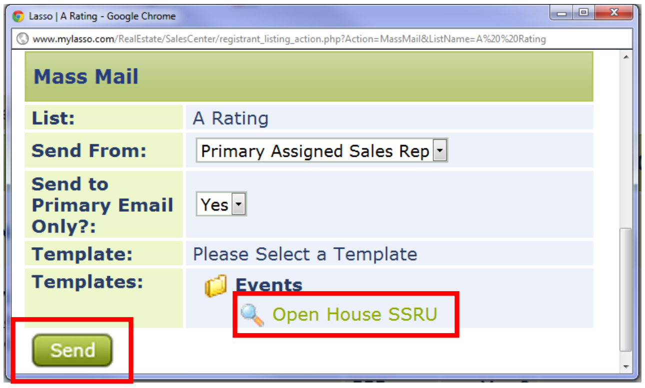
Sending Email Template containing Self Serve Registrant Update

To send an Email Template containing **Self Serve Registrant Update Link**:

1. Once you have completed your testing, pull up the list of Registrants to whom you want to send the SSRU.
2. Check the boxes beside the Registrants' names or click on **Select All**.
3. Click on **Mass Mail**.

PersonalID	Rating	Title	Name	Primary Email	Primary Phone	Last Contact Date	Last Contact Type	Registration Date
5601412	A		Brown, John	jbrown@brownco.com		Mar 2 2012 9:15am	Visit	Apr 9 2008 5:00pm
4026947	A		Seine, Jerome	jerome.seine@aol.com		Mar 2 2012 9:15am	Visit	Oct 1 2007 5:00pm
4026941	A		Harris, Eve	eharris@hotmail.com		Mar 2 2012 9:15am	Visit	Oct 1 2007 5:00pm
5601358	A		Cusa, John	johncusa@gmail.com		Mar 2 2012 9:15am	Visit	Apr 9 2008 5:00pm
4026945	A		Arquette, Don	don@scream.com	555-555-5555	Mar 2 2012 9:15am	Visit	Oct 1 2007 5:00pm

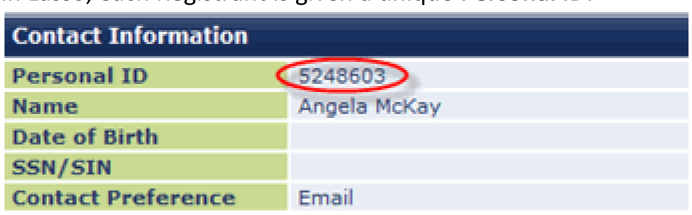
4. Select the SSRU template in the **Mass Mail** window and click **Send**.



About Self Serve Registrant Update Login Text

During the **Self Serve Registrant Update (SSRU)** creation (see Add Self Serve Registrant Update), there is a HTML box for **Login Text**. The following provides an understanding of the **Login Text** and a suggestion of how this should be used.

In Lasso, each Registrant is given a unique **Personal ID**:

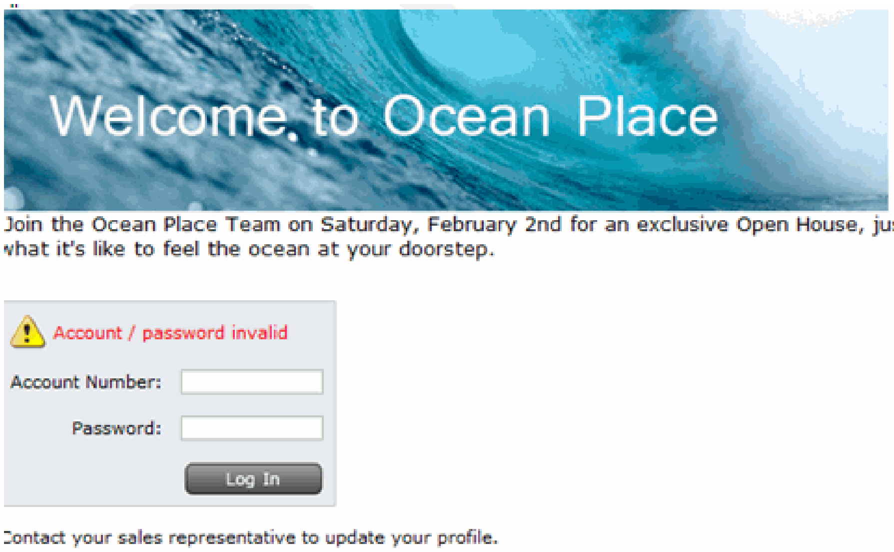


In order for each Registrant to be able to update their Profile information in an **SSRU**, a unique password is created.

Both the Personal ID and password allow the **SSRU** to be updated to the Registrant's profile. When the Registrant updates the information and answers the questions, the information is sent to the Registrant Profile in Lasso.

An error message like the one below may appear for the following reasons:

- The SSRU is sent without first attaching Registrants.
- The SSRU is disabled or it has expired.
- The Registrant accesses the SSRU by cutting and pasting the unique URL that is created from the SSRU rather than linking directly from the email.



If **Login Text** was included when creating the **SSRU**, it would appear at the bottom of this message. In the example, the **Login Text** is **Contact your sales representative to update your profile**.
As a best practice, a client should customize this text. For example, the login text could read:
"You are currently not able to RSVP to this event. Please contact the Ocean Place Sales Center at 604.555.1234 or email us at sales@ourdomain.com to speak to a representative immediately. View our web site now at www.ourdomain.com."
The HTML code would be inserted in the SSRU creation screen, under **Login text**.

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, body, 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 body of the email no wider than 400 pixels. 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.
- 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.