

CharityEngine

Documentation

Template Configuration

Quick Start Guide

Jun-14

WARNING: This document contains business proprietary intellectual property of CharityEngine®. It should not be read by, or otherwise shared with, anyone who has not been expressly authorized access by CharityEngine. If you have received this document and you are not the intended recipient, please delete it from your mailbox and any other storage devices or destroy it immediately. No part of this document should be printed, copied, modified or distributed in any form without the express written permission of CharityEngine.



Contents

Overview..... 3
 Template Syntax..... 4
 Site/Page Templates 5
 Email Templates 6
Appendix..... 6
Contact Us..... 8

Table of Figures

Figure 1: Design Template Manager UI	3
Figure 2: Design Template HTML Editor	4

Overview

Configuration (CE) is a flexible module that powers multiple core components of the CharityEngine software suite, including: donation processing, fundraising, and event registration. An integral part of CharityEngine is the ability to customize the web-facing interface and content that is presented to visitors (e.g. donors, constituents, event registrants, etc.). This is achieved by creating *design templates*.

Web Forms Templates may be accessed through the Configuration module (see sample screen-shot below). In addition to having a "NAME" and a unique two-digit "ID" number, each Design Template is also categorized by "CLASS" and "TYPE".

For "CLASS": the design templates are designated as either **Custom** or **System**. **Custom Templates** are templates that are created by a user and are only visible and available to users who have been given permission to access the *Template Manager* interface (which is one of the pages within the *Configuration Module* – see below). **System Templates** are templates that are generally available to be used by any user with permission to access the Client Access Panel. System Templates can be copied, but they cannot be modified.

For "TYPE": the design templates are designated as either **Site/Page** or **Email**. **Site/Page Templates** define the layout, design, media, and content for landing pages and web forms in TransactionServer. **Email Templates** define email message layout, design, media, and content of messages in TransactionServer.

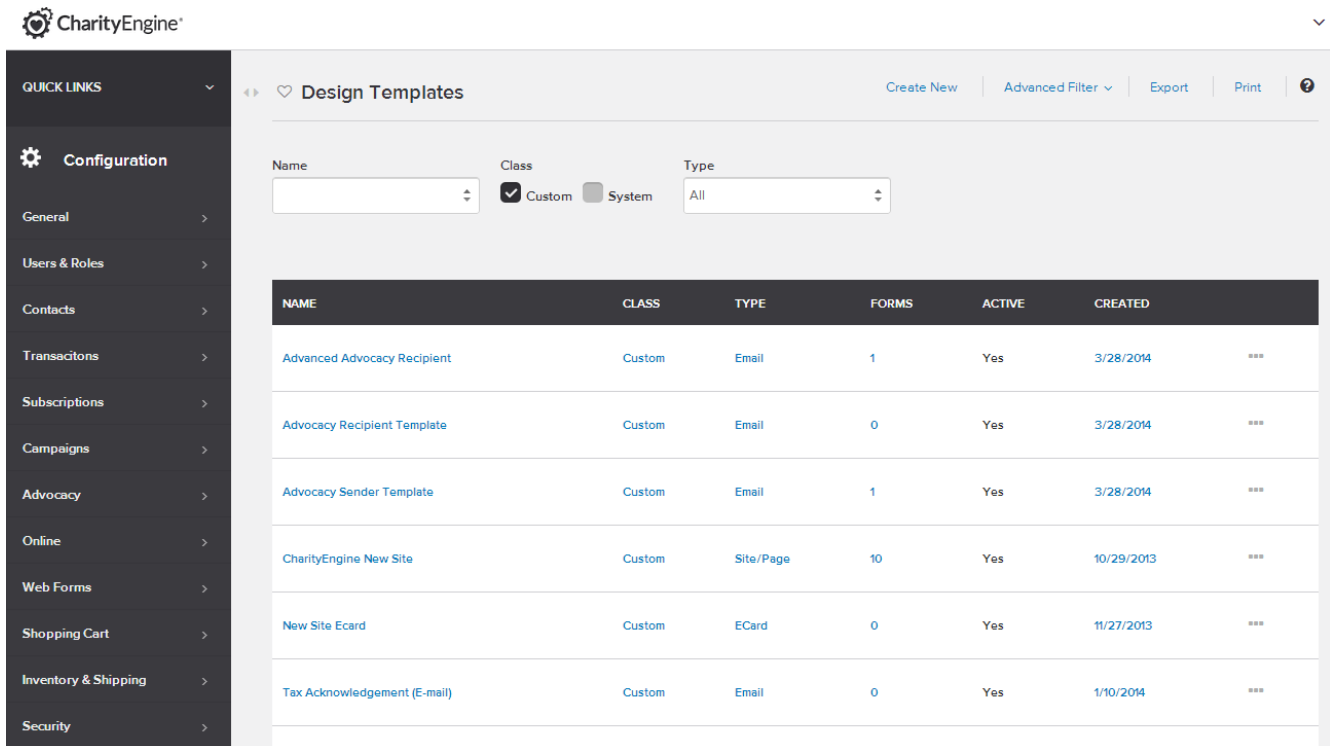


Figure 1: Design Template Manager UI

Both Site/Page and Email design templates can leverage dynamic content that is system generated and/or user entered. For example, a template can define a "content" placeholder for a user's first and last name as they entered it in a donation form or a content placeholder can be defined to output the "Top 5 Fundraisers" for a particular fundraising campaign. Dynamic content and markup can be used in templates by leveraging the CharityEngine Dynamic Content Markup¹.

¹ CharityEngine Dynamic Content Markup is defined in the CharityEngine Dynamic Content Markup Guide.

Template Syntax

New Design Templates can be submitted to the platform either via the Configuration Module or by using the CharityEngine API.

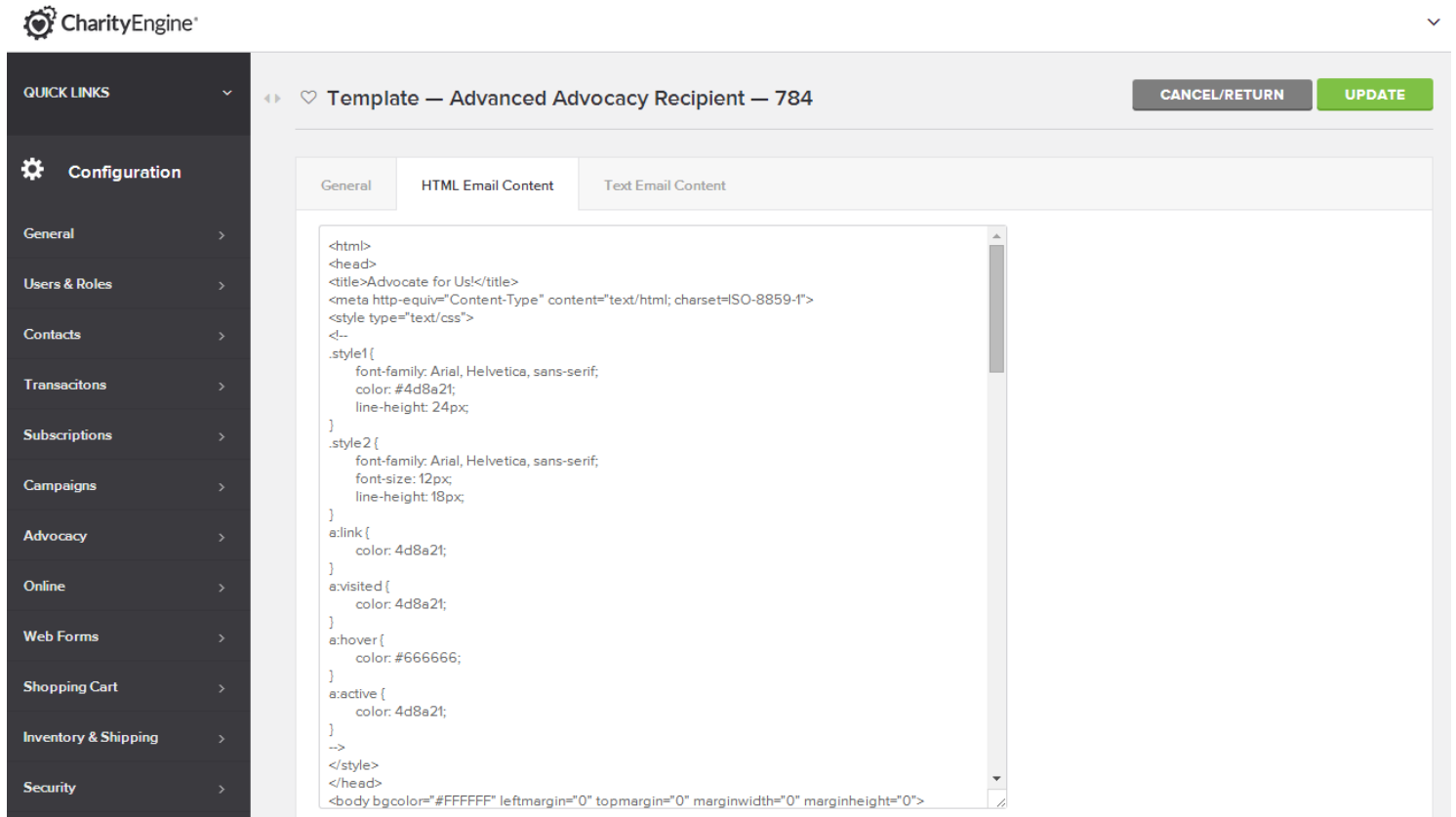


Figure 2: Design Template HTML Editor

The CharityEngine template syntax is made of 4 components:

Site/Page Design Template Components	
Component	Description
Template Structure	The structure of a template is defined by standard compliant HTML, XHTML, JavaScript, or plain text
Template Content	Template content can consist of any browser or email client compatible text, images, video, or other multimedia content
Template Placeholders	Template placeholders are required and optional proprietary markup that instruct CharityEngine where to insert system generated modules and required code into a particular interface
Dynamic Markup	Dynamic markup is a proprietary syntax for dynamically generated system content that is to be inserted into a template at a particular position.

Site/Page Templates

Site/Page Templates can be created using standard compliant XHTML, JavaScript, Content, Media, Placeholders, and Dynamic Markup.

Below is a list of the Site/Page placeholders with their specific syntax.

Site/Page Design Template Placeholders			
Name	Syntax	Req	Description
Site Meta Title	<!--\$\$\$SITE-META-TITLE\$\$\$-->	no	CharityEngine SEO HTML Meta Title Content
Site Meta Description	<!--\$\$\$SITE-META-DESCRIPTION\$\$\$-->	no	CharityEngine SEO HTML Meta Description Content
Site Meta Keywords	<!--\$\$\$SITE-META-KEYWORDS\$\$\$-->	no	CharityEngine SEO HTML Meta Keywords Content
Site Scripts	<!--\$\$\$SITE-SCRIPTS\$\$\$-->	yes	CharityEngine required UI scripting components *must be placed in XHTML head node
TransactionServer Navigation	<!--\$\$\$TS-NAVIGATION\$\$\$-->	no	CharityEngine User Portal Navigation Position – This instructs TransactionServer where to place the user navigation for authenticated users
TransactionServer Fundraising User Portal Navigation	<!--\$\$\$TS-FUNDRAISING-USERPORTAL-NAVIGATION\$\$\$-->	no	CharityEngine Fundraising Portal Navigation – This instructs TransactionServer where to place the public and private fundraising portal for public and

			private users of the organizations fundraising portal
Content	<!--***CONTENT***-->	yes	CharityEngine Registration or Donation Form – this instructs TransactionServer where to place the dynamic form content for the particular Site/Page
BIS Footer	<!--***BISFOOT***-->	no	CharityEngine Footer Branding – this instructs TransactionServer where to place the CharityEngine/TransactionServer logo and Security Seals. *if this placeholder is not present, TransactionServer will generate the logo and Security Seals below the template in its own html div nodes.

Email Templates

Email Templates can be created using standard compliant XHTML, Content, Media, and Dynamic Markup. There are no Placeholders for email templates. *Note: Email templates should be constructed with end user email client compatibility as well as email deliverability in mind.*

Appendix

A.1 – Sample Site/Page Design Template

Site/Page Design Template - XHTML
<pre> <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd"> <html xmlns="http://www.w3.org/1999/xhtml"> <head> <meta http-equiv="Content-Type" content="text/html; charset=utf-8" /> <title>&lt;!--\$\$\$SITE-META-TITLE\$\$\$--&gt;</title> <meta content="text/html; charset=utf-8" http-equiv="Content-Type" /> <meta content="&lt;!--\$\$\$SITE-META-DESCRIPTION\$\$\$--&gt;" name="description" /> <meta content="&lt;!--\$\$\$SITE-META-KEYWORDS\$\$\$--&gt;" name="keywords" /> <!--\$\$\$SITE-SCRIPTS\$\$\$--></head> <body> <div> <!--\$\$\$TS-NAVIGATION\$\$\$--> </div> <div> <!--\$\$\$TS-FUNDRAISING-USERPORTAL-NAVIGATION\$\$\$--> </div> <div> </pre>

```

<!--EXAMPLE IF TRANSACTIONSERVER SIMPLE MARKUP-->
Welcome: ^^USERNAME^^
</div>
<div>
  <!--EXAMPLE IF TRANSACTIONSERVER ADVACNED MARKUP-->
  <bis:transactionserver:top_individual_fundraisers count="5"
makeamountlink="0" firstnamelinktarget="_blank" lastnamelinktarget="_blank"
firstlastnamespacerlinktarget="_blank"
orgfundraisingportal_id="[[orgFundraisingPortal_id]]"></bis:transactionserver:top_i
ndividual_fundraisers>
</div>
<div>
  <!--***CONTENT***-->
</div>
<div>
  <!--***BISFOOT***-->
</div>
</body>
</html>

```

A.2 – Sample Email Design Template

Email Design Template

```

Dear ^^firstname^^ ^^lastname^^,<br />
<br />
Thank you for donating to our organization and helping us with our initiatives. <br
/>
<br />
<strong>The following summarizes your contribution:</strong><br />
Reference ID: ^^TRANSACTION_ID^^<br />
Payment Amount: ^^TRANSACTION_AMOUNT^^<br />
Date: ^^DATETIME^^<br />
Tax ID: xx-xxxxxxx<br />
<br />
Your full donation is tax deductible. No goods or services were provided in
exchange for your contribution.<br />
<br />
<strong>User Account Information</strong><br />
Username: ^^USERNAME^^<br />
Password: ^^PASSWORD^^<br />
<br />
<strong>Click <a
href="http://www.transactionserver1.com/fundraising/dsp_ts_orgFundRaisingPortal_log
in.aspx?org_frpid=0">here</a> to log in and manage your account anytime or to setup
an individual fundraising portal to help us spread the word through your personal
network.</strong><br />
<br />
Please keep this email for your records.

```


Contact Us

We love hearing from you and we read and respond to all feedback. Please write to us and tell us how CharityEngine helps you be more productive, any challenges you may have encountered with the software, and/or suggestions for improvement using our Contact Us form - <http://www.charityengine.net/contact-us>.

Emailing Us

You can contact us directly by emailing us at support@bisglobal.net.

Mailing Address

You can write to us at:

CharityEngine

8200 Greensboro Drive

Suite 1500

McLean, VA 22102