

# General Features Guide

11/14/2014 Blackbaud Direct Marketing 4.0 General Features US

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# General Features

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The application provides many features to help you navigate through, access, and share your information. This guide explains various navigation tools in the application and how to use features such as the home page and favorites.

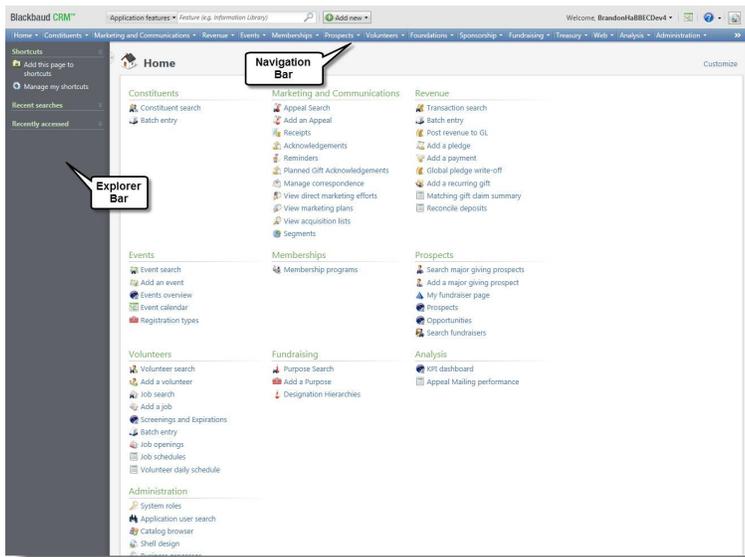
## General Navigation

The application includes a variety of navigation features that give you increased control over the software.

### Navigation and Explorer Bars

Pages in the application include the following features:

- **Navigation bar:** The navigation bar allows you to navigate through the application and return to your home page. Your role in the application determines the appearance of the navigation bar, and it only displays features that you have permission to access.
- **Explorer bar:** From the explorer bar, you can quickly access recently performed searches, recently viewed records and pages, and shortcuts. Based on the current page, you can also access related tasks and activities.



## Shortcuts for My Profile

On the My Profile page, you can use the **Shortcuts** feature to create shortcuts to pages and records that you access frequently. You can specify pages as shortcuts to access them from the **Shortcuts** menu on the explorer bar.

You can also organize, rename, and delete shortcuts and email shortcut links.

### ► Add a shortcut

1. Open the location you want to save as a shortcut.
2. On the explorer bar, click **Add this page to shortcuts**.

Or

1. Under **Shortcuts**, click **Manage my shortcuts**. The My Profile page displays.
2. Click **Add a task**. The Add tasks to shortcuts screen displays. All functional areas in the application containing tasks to which you can create a shortcut display in the **Functional area** box.
3. Select the functional area that contains the task(s) to which you want to link. All tasks display in the **Task** box.
4. Select all tasks to which you want to create a shortcut.
5. Click **Save**.
6. Once a shortcut has been added, you can rename, delete, move, or email a link to the shortcut. Select the shortcut you wish to modify:
  - Select **Rename** to modify the name of the shortcut. Enter the desired name and click **Save** to rename the shortcut.
  - Select **Delete** and press **Yes** to delete the shortcut.

- Select **Email link** to generate an email message that includes a link.
- Select **Move to top**, **Move up**, **Move down**, or **Move to bottom** to move the link to the desired location.

## Rearrange Tabs

You can now drag and drop tabs and subtabs into any order you prefer. This is a sticky setting, so it is saved the next time you access any record of the same type. This allows you to organize the tabs in the order that makes sense for your workflow. Any record that uses tabs, such as , can use this feature.

**Note:** There is no way to reset the tabs to their default setting once they have been moved. They must be moved manually in order to reset them to the default.

## Change Password

All users should change their passwords the first time they log into the application and on a regular basis according to your organization's security policy. Passwords expire every 90 days and users are prompted 15 days in advance to change it.

All passwords are case sensitive and must meet the following complexity standards:

- A password cannot be the same or overly similar to a previously used password.
- Passwords must be at least eight characters in length.
- Passwords must contain at least three of the following four character types: uppercase letters (ABC), lowercase letters (abc), numbers (123), or symbol characters (!@#).

### ► Change your password

1. On the menu bar, click **Welcome** and select **Change password**. The Change password screen appears.
2. In the **Old password** field, enter your current password.
3. In the **New password** and **Confirm password** fields, enter a new password that meets the following complexity requirements:
  - A password cannot be the same or overly similar to a previously used password.
  - Passwords must be at least eight characters in length.
  - Passwords must contain at least three of the following four character types: uppercase letters (ABC), lowercase letters (abc), numbers (123), or symbol characters (!@#).
4. Click **Save**.

## Refresh a Page

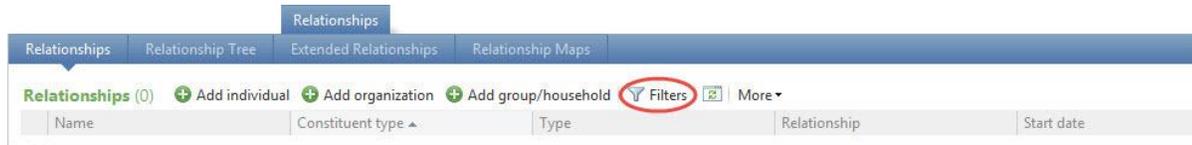
When you work in the application, you might encounter a situation where a record is changed by another user while you view it. If this happens, the information on the page might be inaccurate. You can refresh the page to display the most current information in the database.

To refresh a page, click **Refresh**.

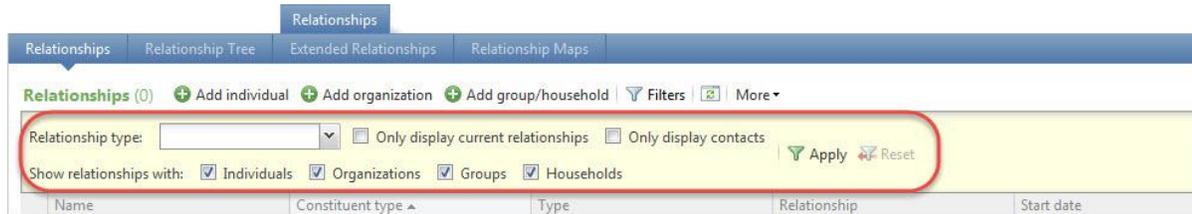
## Filters

The **Filter** button allows you to customize entries in data lists. You can use the **Filter** button to select record types to display in a list or to select a date range. The filter options that appear depend on the type of data in the list.

For some data lists, the filter options always appear above the lists. For other data lists, you must click **Filter** to open the filter options.



The filter options that appear depend on the data list.



When you apply filters to a list of items, the application remembers your filter settings and uses them as defaults the next time you view the list.

Filter settings are stored for each user, so a user's defaults do not impact anyone else. Filter settings are also stored across sessions, so you can log out and log back in and still see your defaults.

**Note:** There are also filters on some dashboards and reports; however, these settings are not stored and must be reapplied each time you access the dashboard or report.

You can also sort the information that appears in a datalist by clicking on a column heading. For example, you can click on a **Date** column heading and items will be listed in chronological order. Sort options are not stored and must be reapplied each time you access the datalist.

## Navigation Tree

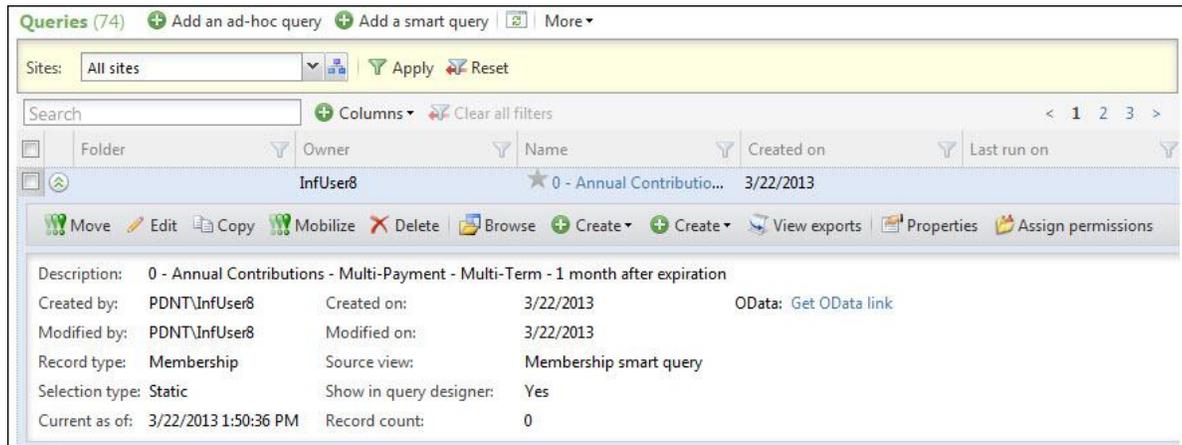
The navigation tree is an efficient way to view multiple, nested pages of information. The navigation tree displays information as an expandable, hierarchical set of links to other pages. This lets you to see the big picture rather than a single path.

For example, you can open a fundraising purpose and get a broad view of all the activities involved by displaying links to all of the associated appeals.

If a navigation tree is available, it is collapsed on the top-right side of the page. To expand the navigation tree, click the link.

# Lists

There are two types of lists in the program: data lists and list builder lists. List builder lists include more advanced options for sorting and navigating the data on the list.



The following features are available in data lists and list builder lists.

- To sort the grid data by a specific column, click the column header. The column is sorted in ascending order. Click the column header again to sort in descending order.
- To auto-size list columns, click **More, Autosize all columns**. The columns will adjust to fit the largest piece of data contained within each column.
- To revert back to the grid defaults, click **More, Restore grid defaults**.

**Tip:**

After you make desired list changes, we recommend you save your list for future access. You can save as many lists as you need to segment and review data.

You can also complete tasks for records on the list. To access task buttons, click the double arrows next to a record to expand the row. Expanded rows may also include additional information about the record.

After you create a list, you can download the information for future reference. You can download a list as a comma-separated values (.CSV) file or a Microsoft *Excel* (.XLSX) spreadsheet. For example, you can download a .CSV file of addresses to provide to a mail house, or export an *Excel* spreadsheet for use outside of the program.

- To download a list, click **More** and then click **Download to CSV** or **Download to XLSX**.
- To save a list, click **Save list**. In the Save list screen, enter a name and description to identify the list and click **Save**.
- To open a saved list, click **Open list**. In the Open a list screen, click the name of the list. To narrow down the lists that appear, search for a list by its name.

**Note:** Saved lists are visible to any user that has access to that data list. However, saved lists do respect data security permissions.

**Note:** Not all lists currently support the save and open list features.

These features are exclusive to list builder lists:

- To filter data in a column, click the filter  icon.

Enter your filter criteria based on the data in the column. For example, for a date-based column, you can enter date criteria, such as all donations after 11/1/2012. For name-based columns, you can enter the name by which you want to filter, such as all registrants with the last name Williams.

- You can search for specific list items in the **Search** field. The program uses your criteria but only searches through the first 500 records that display for the list. Before you use the search, we recommend you use the column filters to narrow down the results.
- To select which columns to display, click **Columns** and select which columns to show and hide. Use the **Search** field to quickly find a column by name.
- To reorganize columns in the grid, drag and drop a column header.
- Columns and filters are sticky by user.

## Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

## Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

### Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

#### ► Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

## Add an Attachment Screen

Screen Item	Description
<b>Type</b>	Select the type of attachment. The system administrator configures attachment types.
<b>Date</b>	Enter the date of the attachment.
<b>Title</b>	Enter the title, or purpose, of the attachment.
<b>Author</b>	To search for the author, click the binoculars. A search screen appears.
<b>File</b>	To locate the attachment, click <b>Choose file</b> . To view an attachment, click <b>Open file</b> . To remove an attachment, click <b>Clear file</b> .

## Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

### ► Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

## Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

### ► Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

## Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

## Add Media Links

When you add a media link, you enter the website address.

### ► Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

## Add a Media Link Screen

Screen Item	Description
<b>Type</b>	Select the type of media link. The system administrator configures media link types.
<b>Date</b>	Enter the date of the media link.
<b>Title</b>	Enter the title, or purpose, of the link.
<b>Author</b>	To search for an author, click the binoculars. A search screen appears.
<b>Media URL</b>	Enter the URL for a website.

## Edit Media Links

You can edit the URL for a website.

### ► Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

## Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

### ► Delete a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

## Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

## Add Notes

On the Documentation tab, you can track notes about your records.

### ► Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

## Add a Note Screen

Screen Item	Description
<b>Type</b>	Select the type of note. The system administrator configures note types.
<b>Date</b>	Enter the date of the note.
<b>Title</b>	Enter the title, or purpose, of the note.
<b>Author</b>	To search for an author, click the magnifying glass. A search screen appears.
<b>Notes</b>	Enter the content of the note.

## Edit Notes

On the Documentation tab, you can edit notes as necessary.

### ► Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

## Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

### ► Delete a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

## Notifications

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you notify all users to when they open the record of a board member.

Notifications are not available for every record type. They are available only for:

Notifications appear on the information bar of a record.

**Robert Hernandez**

Notifications: "Board member". Click here for more information.

**Individual**      **Lookup ID: 8-10024918**

Constituencies: Friend   Major donor   Event registrant

Personal Information	Contact Information	Addresses
 <b>Robert Hernandez</b> Nickname: Robert Maiden:	<b>Primary phone</b> +1 843-312-2991 (Home) <b>Primary email</b> Primary email	1003 Cedar St Elizabeth City, NC 27909-3701 (Current)

Primary Relationships	Documentation and Interactions	Memberships
<b>Spouse</b> Spouse <b>Household</b> Add to household <b>Primary business</b>	Notes: 1      Note Media links: 0      Media link Attachments: 0      Attachment Interactions: 3      Interaction	ID:      Status: Expiration: Level: Member since:

**Note:** Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when users view a record. The notification screen appears the first time a user views a record during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in *Administration*. You can also create notifications for a record from the Documentation tab of the record.

## Add Notifications to Specific Records

On the Documentation tab, you can add a notification to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

### ► Add a notification

1. Go to the Documentation tab of a record.
2. Select a note to use for the notification. The note's title and text appear as the notification.

**Note:** You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.

4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Click **Save**. You return to the Documentation tab.

## Edit Notifications for Specific Records

After you add a notification to a record, you can edit its properties on the Documentation tab. You can change how long to display the notification and who views it. To edit the notification's content, you edit the note associated with the notification.

### ► Edit a notification

1. Go to the Documentation tab of a record.
2. Click the double arrows beside the note with the notification and click **Edit notification**. The Edit notification screen appears.
3. Make changes as necessary to the notification, such as how long to display it and who views it.

**Note:** To edit the notification title or content, edit the note itself.

4. Click **Save**. You return to the Documentation tab.

## Delete Notifications from Specific Records

On the Documentation tab, you can delete a notification when you no longer need it.

**Note:** For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

To remove a notification from a record, click the double arrows beside the note with the notification to remove and click **Delete notification**.

## Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

## Reports Toolbar

When you generate a report, you can use the report toolbar to modify how you view the report. The toolbar buttons are common to all reports.

Toolbar item	Description
<b>First Page</b>	On a report with multiple pages, click this button to return to the first page.
<b>Previous Page</b>	On a report with multiple pages, click this button to return to the previous page.
<b>Current Page</b>	The chronological number of the selected page appears. To navigate to a specific page, enter the page number and press <b>ENTER</b> .
<b>Next Page</b>	On a report with multiple pages, click this button to return to the previous page.
<b>Last Page</b>	On a report with multiple pages, click this button to go to the last page.
<b>Refresh</b>	To refresh information to include new or updated data, click this button.
<b>Export</b>	To select a file format for exporting, click this button. File types include XML file with report data, CSV (comma delimited), TIFF file, pdf file, Web archive, <i>Excel</i> , and <i>Word</i> . <b>Note:</b> In exported reports, such as PDF versions of the reports, some items may appear as links. These currently direct you to the Blackbaud website, instead of to the specific records in the program.
<b>Search Text</b>	To search the report for a word or phrase, enter the text in this field and click Find.
<b>Find</b>	To search for text entered in the Search Text field, click this button.
<b>Next</b>	To search for the next instance of text in the Search Text field, click this button.

## HTML Editor

The program provides a powerful HTML editor to allow you to format and lay out content. With the HTML editor, you can update content easily and safely while you maintain control over the design and content.

You can use the HTML editor in different views, depending on your HTML experience and where you access the HTML editor in the program.

- **Normal** – When you open the HTML editor to create or edit content, this is the “normal” view. This view is similar to a standard word processing application. By default in normal view, when you press **ENTER**, you create a `<p>` tag in the HTML content to indicate a new paragraph. When you press **SHIFT + ENTER**, you create a `<br>` tag to indicate a single carriage return in the content.
- **HTML** – To view or edit the HTML source code, click **HTML Code** on the View tab in the toolbar. The HTML Source Editor screen appears. To return to the normal view, close the window. You cannot use the HTML view to embed your own form via HTML in the HTML editor. We recommend you put the form on a page that is not

stored in the program but can be referenced in an iFrame. For more information about how to include customized forms in the program, contact Blackbaud's Professional Services at [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

- **Preview** – To view the content as it will appear on the web page and to test hyperlinks, click **Preview** on the View tab in the toolbar. The Preview screen appears. To return to the normal view, close the window.

## HTML Editor Functions

These tables explain the buttons and menus on the toolbar of the HTML editor. Some features have more buttons available than others.

**Note:** On your website, users can use an HTML editor with a limited set of these buttons on some parts. With the HTML editor, users can also insert images, tables, or links.

### Buttons on the Toolbar

Button	Function	Description
	Full screen	To work in full screen mode, click <b>Full screen</b> . To turn off full screen mode and view the screen at its normal size, click <b>Full screen</b> again.
	Preview	To view the content as it will appear on the web page, click <b>Preview</b> . The Preview screen appears. To return to the normal view, close the window.
	<b>Print</b>	To print the current content, click <b>Print</b> . The Print screen appears. Select the printer and your print preferences, and click <b>Print</b> .
	Edit HTML source	To view or edit the HTML source code, click <b>Edit HTML source</b> . The HTML Source Editor screen appears. To return to the normal view, close the window.
	<b>Clean up HTML</b>	To remove unnecessary tags from the HTML, click <b>Clean up HTML</b> . The Clean Up HTML screen appears. With the buttons on this screen, you can remove all HTML tags, remove all Microsoft <i>Word</i> -specific markup, clean up stylesheets, clean up <Font> tags, and clean up <Span> tags.
	<b>Spell check</b>	To check the spelling, click <b>Spell check</b> . When you turn the spell checker on, it checks the spelling of all existing content in the HTML editor and will check new content as you create it. When the spell checker finds an error, a red squiggly line appears below the word. Right-click the underlined word to select the correct spelling. You can also spell check in different languages. Use the drop-down to select the language.
	<b>Find and replace</b>	To find and replace text, click <b>Find and replace</b> . The Find/Replace screen appears. In the <b>Find what</b> field, enter the text to search for. In the <b>Replace with</b> field, enter replacement text. To search for the text, click <b>Find next</b> . To replace the text, click <b>Replace</b> . To replace all instances, click <b>Replace all</b> .
	<b>Cut</b>	To remove text from the content area and copy it to the clipboard, click <b>Cut</b> . The text is removed, and you can paste it elsewhere in the content area.
	<b>Copy</b>	To copy text to the clipboard, click <b>Copy</b> . You can paste the text elsewhere in the content area. <b>Note:</b> For <i>Firefox</i> , security settings disable the <b>Copy</b> button. To copy text to the clipboard in <i>Firefox</i> , highlight it and press <b>CTRL-C</b> .
	<b>Paste</b>	To paste text from the clipboard, click <b>Paste</b> . The text appears in the content area. It retains the formatting from when you cut or copied it. <b>Note:</b> For <i>Firefox</i> , the <b>Paste</b> button in HTML mode removes HTML tags. To paste text with HTML tags in <i>Firefox</i> , press <b>CTRL-V</b> . For <i>Firefox</i> on Macs, you cannot paste text with HTML tags in HTML mode because Ctrl-V also removes the HTML tags.
	<b>Paste plain text</b>	To paste text from the clipboard without any formatting, click <b>Paste plain text</b> . The text appears in the content area and does not retain its formatting.

Button	Function	Description
	<b>Paste from Word</b>	To paste text from the clipboard that you copied from Microsoft <i>Word</i> , click <b>Paste from Word</b> . The text appears in the content area without the proprietary HTML of <i>Word</i> . The text format may differ from the format in <i>Word</i> .
	<b>Insert page break</b>	To insert a printed page break, click <b>Insert page break</b> . The HTML editor adds a division with an attribute of PAGE-BREAK-BEFORE: always at the selected location.
	Insert horizontal rule	To insert a horizontal line, click <b>Insert horizontal rule</b> in the toolbar. On the screen that appears, enter the width and height for the line and select whether to include a shadow.
	<b>Insert custom characters</b>	To insert a special character, click <b>Insert custom characters</b> . The Custom characters screen appears. In the grid, select a character. The custom character appears at the selected location.
	Insert anchor	To link to a specific location on a page, place your cursor at the link's endpoint (for example, a heading) and click <b>Insert anchor</b> . The Insert/edit anchor screen appears so you can enter a name for the anchor's location. The HTML editor adds <code>&lt;a name="anchor name"&gt;&lt;/a&gt;</code> before the defined location. In the normal view, the HTML editor displays an anchor symbol at the defined location. To link to the anchored location, in the HTML source view, append "#anchorname" to the end of the link.
	<b>Insert image</b>	To insert an image, click <b>Insert image</b> . On the Select Image from Image library screen, you can select the image.
	<b>Insert link</b>	To link text to a web address or web page, click <b>Insert link</b> . If the text is in a format that the program recognizes as a web address or page, such as <code>www.abc123.org</code> , the link formats automatically. Otherwise, the page link screen appears.
	<b>Remove link</b>	To remove a hyperlink from text, click <b>Remove link</b> . The text no longer acts as a hyperlink.
	<b>Undo</b>	To undo the last action in the content area, click <b>Undo</b> . The action is reversed. You can undo multiple actions.
	<b>Redo</b>	To redo an undone action in the content area, click <b>Redo</b> . The action is reinstated. You can redo multiple actions.
	<b>Help</b>	To access a description of the HTML editor features, click <b>Help</b> . The help file appears.
	<b>Insert table</b>	To insert a table, click <b>Insert table</b> . The Insert/edit table screen appears. For more information about option on this screen, see HTML Editor Table and Line Properties on page 20. After you create a table, you can select it and click <b>Insert table</b> to edit its properties.
	<b>Delete table</b>	To delete a table, select it and click <b>Delete table</b> .
	<b>Row properties</b>	To edit the properties of a row, select it and click <b>Row properties</b> . The row properties screen appears. For more information about row properties, see HTML Editor Table and Line Properties on page 20.
	<b>Cell properties</b>	To edit the properties of a cell, select it and click <b>Cell properties</b> . The cell properties screen appears. For more information about cell properties, see HTML Editor Table and Line Properties on page 20.
	<b>Insert row above</b>	To insert a row above a row in a table, click <b>Insert row above</b> . A new row appears.
	<b>Insert row below</b>	To insert a row below a row in a table, click <b>Insert row below</b> . A new row appears.
	<b>Delete row</b>	To remove a row from a table, click <b>Delete row</b> . The row is deleted.

Button	Function	Description
	<b>Insert column to the left</b>	To insert a column to the left of a column in a table, click <b>Insert column to the left</b> . A new column appears.
	<b>Insert column to the right</b>	To insert a column to the right of a column in a table, click <b>Insert column to the right</b> . A new column appears.
	<b>Delete column</b>	To remove a column from a table, click <b>Delete column</b> . The column is deleted.
	<b>Split merged table cells</b>	To split a cell that spans multiple rows into two cells, click <b>Split merged table cells</b> . The selected cell no longer spans the row on the bottom.
	<b>Merge table cells</b>	To merge a cell with the cell to its right, click <b>Merge table cells</b> . Any content in the cell on the right is removed, and the selected cell now spans both columns.
	<b>Show table borders</b>	To hide or reveal the borders of your tables, click <b>Show table borders</b> .
	<b>Insert new layer</b>	To insert a layer, click <b>Insert new layer</b> . The HTML editor adds a layer using the <div> tag. To reposition the layer, select the layer and use the crossed arrows to drag the layer to the new location. To resize the layer, drag the resize handles found at the layer's corners or sides.
	Move layer forward	To move a layer forward, select the layer and click <b>Move layer forward</b> . The HTML editor increases the z-index number for the layer.
	Move layer backward	To move a layer backward, select the layer and click <b>Move layer backward</b> . The HTML editor decreases the z-index number for the layer.
	<b>Absolute positioning</b>	To apply absolute positioning to a selected layer, click <b>Absolute positioning</b> . The HTML editor adds the position: absolute tag to the layer and its location on the page in pixels. To remove absolute positioning from the selected layer, click <b>Absolute positioning</b> again.
	<b>Direction left to right</b>	To apply left to right directionality to all items in the division, click <b>Direction left to right</b> . For a left to right table, column zero is on the left side and row zero is at the top.
	<b>Direction right to left</b>	To apply right to left directionality to all items in the division, click <b>Direction right to left</b> . For a right to left table, column zero is on the right side and row zero is at the top.
	<b>Block quote</b>	To insert a long quotation, click <b>Block quote</b> . The HTML editor adds a <blockquote> tag around the selected text.
	<b>Abbreviation</b>	To add a tooltip that defines an abbreviation, select the word and click <b>Abbreviation</b> . The Abbreviation Element screen appears so you can enter the abbreviation's definition in the <b>Title</b> field and define formatting for the tooltip. The HTML editor adds an <abbr> tag around the selected word. When viewed in a browser, the abbreviation is underlined and a tooltip appears when you place your cursor over the underlined word. Screen readers read the abbreviation as a word, rather than spell out the letters.
	<b>Acronym</b>	To add a tooltip that defines an acronym, select the word and click <b>Acronym</b> . The Acronym Element screen appears so you can enter the acronym's definition in the <b>Title</b> field and define formatting for the tooltip. The HTML editor adds an <acronym> tag around the selected word. When viewed in a browser, the acronym is underlined and a tooltip appears when you place your cursor over the underlined word. Screen readers read the acronym as a word, rather than spell out the letters.
	<b>Citation</b>	To add an in-line citation or reference to another source, select the word or phrase and click <b>Citation</b> . The Citation Element screen appears so you can enter text in the <b>Title</b> field for the citation's tooltip (such as the author, book title, and page number(s) or a link to a website) and define formatting for the tooltip. The HTML editor adds a <cite> tag around the selected word or phrase. When viewed in a browser, the citation is usually italicized and the tooltip appears when you place your cursor over the italicized word or phrase.

Button	Function	Description
	<b>Bold</b>	To make text bold, click <b>Bold</b> . The HTML editor adds a <strong> tag around the text.
	<b>Italic</b>	To italicize text, click <b>Italic</b> . The HTML editor adds an <em> tag around the text.
	<b>Underline</b>	To underline text, click <b>Underline</b> . The HTML editor adds a <u> tag around the text.
	<b>Strikethrough text</b>	To strike a line through text, click <b>Strikethrough text</b> . The HTML editor adds a <strike> tag around the text.
	<b>Superscript</b>	To strike a line through text, click <b>Strikethrough text</b> . The HTML editor adds a <strike> tag around the text.
	<b>Subscript</b>	To strike a line through text, click <b>Strikethrough text</b> . The HTML editor adds a <strike> tag around the text.
	<b>Align left</b>	To align text to the left, click <b>Align left</b> . The HTML editor adds an attribute of align=left to the division.
	<b>Align center</b>	To align text to the center, click <b>Align center</b> . The HTML editor adds an attribute of align=center to the division.
	<b>Align right</b>	To align text to the right, click <b>Align right</b> . The HTML editor adds an attribute of align=right to the division.
	<b>Align full</b>	To fully justify text, click <b>Align full</b> . The HTML editor adds an attribute of align=justify to the division.
	<b>Remove format</b>	To remove formatting from text, click <b>Remove format</b> . The HTML editor removes any special format attributes, and the text appears as plain text.
	<b>Text color</b>	To change the color of text, click <b>Text color</b> and select a color from the palette. The HTML editor adds a <span> tag with the color around the text.
	<b>Highlight</b>	To highlight text, click <b>Highlight</b> and select a color for the highlight from the palette. The HTML editor adds a <span> tag with the background color around the text.
	<b>Insert numbered list</b>	To insert a numbered list, click <b>Insert numbered list</b> . The HTML editor adds an <ol> tag at the selected location. The items are numbered sequentially, starting with "1." To end a list, click <b>Insert numbered list</b> again.
	<b>Insert unordered list</b>	To insert a bulleted list, click <b>Insert unordered list</b> . The HTML editor adds an <ul> tag at the selected location. The items in the list have bullets. To end a list, click <b>Insert unordered list</b> again.
	<b>Indent text</b>	To increase an indent, click <b>Indent text</b> . The HTML editor adds a <blockquote> tag around the paragraph. If you increase the indent for a list item, the number or bullet changes to indicate a secondary relationship to the list.
	<b>Outdent text</b>	To decrease an indent, click <b>Outdent text</b> . The HTML editor removes the <blockquote> tag around the paragraph. If you decrease the indent of a list item, the text becomes plain text. If you decrease the indent of a secondary list item, the number or bullet becomes part of the parent list.
	<b>Stylesheet options</b>	To render content on a page, the program uses the stylesheet associated with the page's layout. To view your content with stylesheets applied and edit the content for a specific stylesheet, click <b>Stylesheet options</b> . On the Stylesheet Options screen, you can select the stylesheet to view and override the background and foreground colors of the HTML editor to improve readability. For more information about how to view content with stylesheets applied, see <a href="#">Style Sheet Options</a> on page 18.
	<b>Insert conditional content</b>	To add conditional content to an email message to customize the message for different types of recipients, click <b>Insert conditional content</b> . On the Conditional Content screen, you can create the first conditional content block. You can then define the content and select the group of recipients who view it. This button appears only on the add/edit screens for templates, messages, and

Button	Function	Description
		newsletters. If you send an email message from <i>Blackbaud Direct Marketing</i> , this option does not appear.
	<b>View conditional content</b>	To verify that conditional content appears as expected for each group of recipients, click <b>View conditional content</b> . The View Message screen appears. This button appears only on the add/edit screens for templates, messages, and newsletters. If you send an email message from <i>Blackbaud Direct Marketing</i> , this option does not appear.
	Insert merge fields	To add merge fields with personalized information to the HTML content, click <b>Insert merge fields</b> . For more information, see Merge Fields on page 18.
	Insert content placeholder	On the add or edit layout screen, you can click <b>Insert content placeholder</b> to add panes for parts to the layout. A yellow icon appears as a placeholder for a pane. When you create templates and web pages, a pane contains multiple parts. You select the parts to appear in the pane.

## Menus on the Toolbar

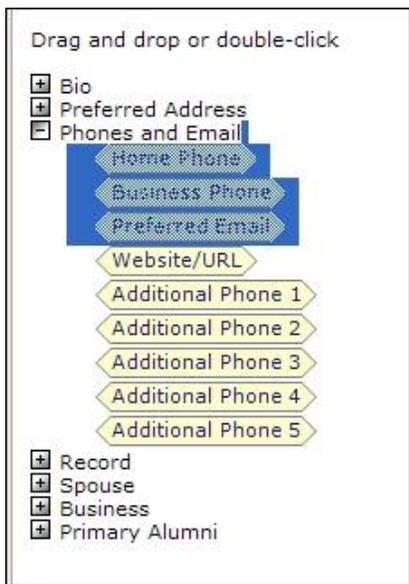
Menu	Menu name	Description
	Font menu	This menu lists common fonts that appear correctly on most web browsers. To change the font applied to text, select a font.
	Size menu	To change the size of text, select a size from this menu.

Menu	Menu name	Description
	Paragraph menu	To apply a paragraph tag to text, select a format from this menu. For example, select “Normal” for body text.

## Merge Fields

To create personalized content, use merge fields to display offline information. For example, in an email, you can insert the **First name** merge field so it displays “Hello, <First name>” to the recipient.

- To add merge fields, click **Merge fields** on the Insert tab in the HTML editor toolbar. The merge fields list appears in a separate window that you can move around.
- To view the available fields, click the plus sign next to a group of fields to expand the list.
- You can double-click or drag and drop merge fields from the window to the content area.
- You can add multiple fields at a time. To do this, place your cursor to the left or right of the group name or fields (not over the group or fields) and click and drag your mouse to select them. After the fields are selected, you can drag them as a group to the content area.



## Style Sheet Options

On your website, the program uses the style sheet associated with a web page’s layout to render the content you enter in the HTML editor. Because the part on which you enter the HTML content may be shared across

multiple web pages with different style sheets, you may need to edit the content as necessary to improve its readability with a specific style sheet. When you use the HTML editor in the normal view, you can view the content as it appears with different style sheets applied.

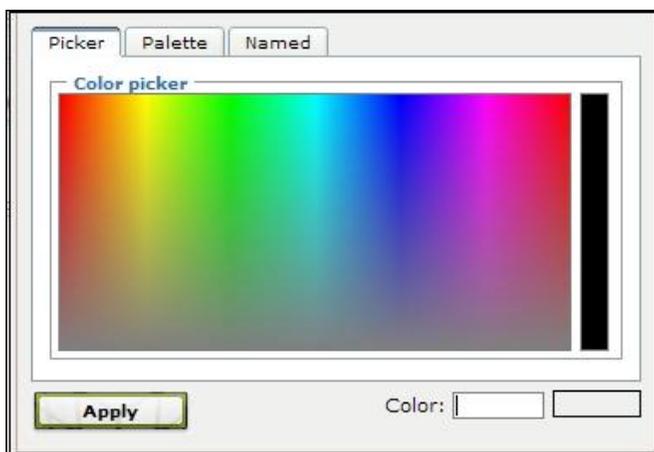
► **View HTML content with a specific style sheet applied**

1. On the View tab in the HTML editor toolbar for formatted text and images parts, click **Style sheet options**. The Style sheet Options screen appears.



2. In the **Edit using style sheet** field, select the style sheet to apply to the content in the HTML editor.
3. Depending on the style sheet, the background and foreground colors of the HTML editor may affect the readability of your text. Change the background and foreground colors of the HTML editor as necessary to edit the content.
  - a. Select **Override style sheet colors**.
  - b. Select the color to adjust. For the background color, click **Select** next to **Editor background color**. For the foreground color, click **Select** next to **Editor default font color**.

The Select a color screen appears. Using the tabs, you can pick a color three different ways or enter its hexadecimal value in the **Color** field.



- c. Click **Apply**. You return to the Style sheet Options screen.
4. Click **OK**. You return to the HTML editor. The content appears with the selected style sheet and colors applied.

## HTML Editor Table and Line Properties

In the normal view, you can use the HTML editor to design tables, table rows, table cells, and horizontal lines that divide the web page. You can also adjust the properties for these items to determine characteristics such as size, styles, and color.

- To create a table, click **Table** on the Insert tab in the HTML editor toolbar. The Insert/Edit Table Screen appears. On the General and Advanced tabs, you can design the table and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab. For more information, see Insert/Edit Table Screen on page 20 Insert/Edit Table Screen on page 20.
- To edit the properties of a row in a table, select the row and click **Row properties** on the Table tab in the toolbar. The Table Row Properties screen appears. On the General and Advanced tabs, you can design the row and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on these tabs. For more information, see Table Row Properties Screen on page 22.
- To edit the properties of a cell in a table, select the cell and click **Cell properties** on the Table tab in the toolbar. The Table Cell Properties screen appears. On the General and Advanced tabs, you can design the cell and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on these tabs. For more information, see Table Cell Properties Screen on page 23.
- To insert a horizontal line, click **Horizontal ruler** on the Insert tab in the toolbar. On the screen that appears, enter the width and height for the line and select whether to include a shadow.

### Insert/Edit Table Screen

To create a table, click **Table** on the Insert tab in the HTML editor toolbar. The Insert/Edit Table Screen appears. On the General and Advanced tabs, you can design the table and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab. After you create a table, you can select the table and click **Table** to edit its properties.

#### General Tab

The screenshot shows the 'Insert/Edit Table Screen' dialog box with the 'General' tab selected. The 'General properties' section includes the following fields:

Cols	2	Rows	2
Cellpadding		Cellspacing	
Alignment	-- Not set --	Border	0
Width		Height	
Class	-- Not set --		
Table caption	<input type="checkbox"/>		

At the bottom of the dialog, there are two buttons: 'Insert' and 'Cancel'.

Screen Item	Description
<b>Cols</b>	Enter the number of columns.
<b>Cellpadding</b>	Enter the amount of space to appear between the ruled line and the content of a cell in the table.
<b>Alignment</b>	Select the horizontal alignment of the table. You can select Left, Center, Right, or Not Set.
<b>Width</b>	Enter the pixel dimensions to use for the cells.
<b>Class</b>	Select the CSS class to apply.
<b>Table caption</b>	Select this checkbox to display a caption at the top of the table. To remove the table caption, clear the checkbox or delete its code in HTML mode.
<b>Rows</b>	Enter the number of rows.
<b>Cellspacing</b>	Enter the amount of space to appear between cells of the table.
<b>Border</b>	Enter the width, in pixels, of a border around the table. To display the table with no border, enter "0."
<b>Height</b>	Enter the pixel dimensions to use for the cell.

### Advanced Tab

The screenshot shows the 'Advanced' tab of a dialog box. It contains the following fields and controls:

- Id**: Text input field.
- Summary**: Text input field.
- Style**: Text input field.
- Language code**: Text input field.
- Background image**: Text input field with a 'Browse' button (represented by a folder icon).
- Frame**: Dropdown menu with "-- Not set --" selected.
- Rules**: Dropdown menu with "-- Not set --" selected.
- Language direction**: Dropdown menu with "-- Not set --" selected.
- Border color**: Color selection field with a color picker icon.
- Background color**: Color selection field with a color picker icon.

At the bottom, there are two buttons: "Insert" (highlighted with a green border) and "Cancel" (highlighted with a red border).

Screen Item	Description
<b>ID</b>	Enter a unique identifier for the table.
<b>Summary</b>	Enter a summary of the table, such as for speech-synthesizing or non-visual browsers.
<b>Style</b>	Enter the CSS class to apply to the table.
<b>Language code</b>	Enter the language code for text in the table, such as "en-US" for United States English. This allows the browser to render content more meaningfully based on accepted cultural practice for the specified language, such as applying correct punctuation and assisting screen readers and search engines.
<b>Background image</b>	To insert an image that appears as the background of the table or cell, click <b>Browse</b> to open the <i>Image library</i> and select an image.
<b>Frame</b>	Select this checkbox to display a caption at the top of the table To remove the table caption, clear the checkbox or delete its code in HTML mode.
<b>Rules</b>	Select which ruled lines appear between cells of the table. You can select to display all lines, no lines, or only those between rows, columns, or groups.

Screen Item	Description
<b>Language direction</b>	Select the directionality for text in the table — left to right or right to left.
<b>Border color</b>	Enter the color for the border of the table. You can enter the standard color name or hexadecimal value, or click <b>Browse</b> to select the color from the palette.
<b>Background color</b>	Enter the color for the background of the table. You can enter the standard color name or hexadecimal value, or click <b>Browse</b> to select the color from the palette.

## Table Row Properties Screen

To change the properties of rows in the table, select a row and click **Row properties** on the Table tab in the HTML editor toolbar. The Table Row Properties screen appears. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab.

Use the field at the bottom of the screen to select which rows to update with changes — the current row, odd rows in the table, even rows in the table, or all rows in the table.

### General Tab

Screen Item	Description
<b>Row type</b>	Select Header, Body, or Footer for the row type.
<b>Alignment</b>	Select the horizontal alignment of the row. You can select Left, Center, Right, or Not Set.
<b>Vertical alignment</b>	Select the vertical alignment of the row. You can select Top, Center, Bottom, or Not Set.
<b>Class</b>	Select the CSS class to apply to the row.
<b>Height</b>	Enter the pixel dimensions to use for the row height.

### Advanced Tab

Screen Item	Description
<b>ID</b>	Enter a unique identifier for the row.
<b>Style</b>	Enter the CSS class to apply to the row.
<b>Language direction</b>	Select the directionality for text in the row — left to right or right to left.
<b>Language code</b>	Enter the language code for text in the row, such as “en-US” for United States English. This allows the browser to render content more meaningfully based on accepted cultural practice for the specified language, such as applying correct punctuation and assisting screen readers and search engines.
<b>Background image</b>	To insert an image that appears as the background of the row, click <b>Browse</b> to open the <i>Image library</i> and select an image.
<b>Background color</b>	Enter the color for the background of the row. You can enter the standard color name or hexadecimal value, or click <b>Browse</b> to select the color from the palette.

## Table Cell Properties Screen

To change the properties of cells in the table, select a cell and click **Cell properties** on the Table tab in the HTML editor toolbar. The Table cell properties screen appears. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab.

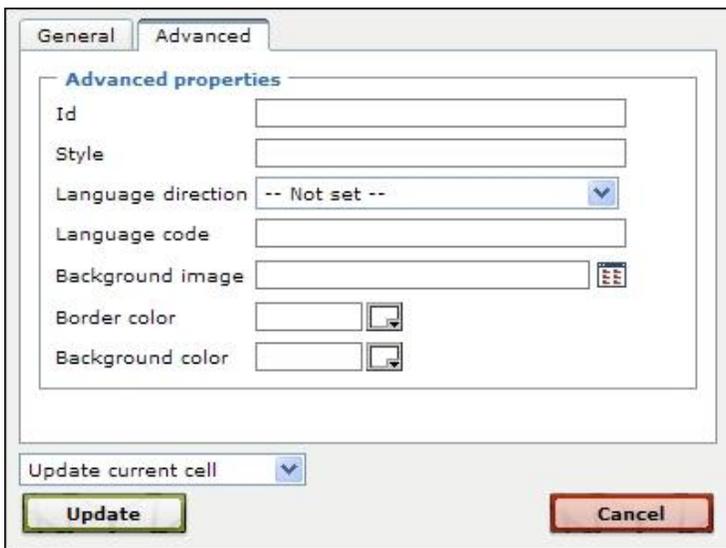
Use the field at the bottom of the screen to select which cells to update with changes — the current cell, all cells in the row, all cells in the column, or all cells in the table.

### General Tab



Screen Item	Description
<b>Alignment</b>	Select the horizontal alignment of the cells You can select Left, Center, Right, or Not Set.
<b>Vertical alignment</b>	Select the vertical alignment of the cells You can select Top, Center, or Bottom.
<b>Width</b>	Enter the pixel dimensions to use for the cell width.
<b>Class</b>	Select the CSS class to apply to the cell.
<b>Cell type</b>	Select whether the cell is a header for a column or includes data.
<b>Scope</b>	Select whether the cell type applies to the column, row, group of columns, or group of rows.
<b>Height</b>	Enter the pixel dimensions to use for the cell height.

**Advanced Tab**



Screen Item	Description
<b>ID</b>	Enter a unique identifier for the cell.
<b>Style</b>	Enter the CSS class to apply to the cell.
<b>Language direction</b>	Select the directionality for text in the cell — left to right or right to left.
<b>Language code</b>	Enter the language code for text in the cell, such as “en-US” for United States English. This allows the browser to render content more meaningfully based on accepted cultural practice for the specified language, such as applying correct punctuation and assisting screen readers and search engines.
<b>Background image</b>	To insert an image that appears as the background of the cell, click <b>Browse</b> to open the <i>Image library</i> and select an image.
<b>Border color</b>	Enter the color for the border of the cell. You can enter the standard color name or hexadecimal value, or click <b>Browse</b> to select the color from the palette.
<b>Background color</b>	Enter the color for the background of the cell. You can enter the standard color name or hexadecimal value, or click <b>Browse</b> to select the color from the palette.

