

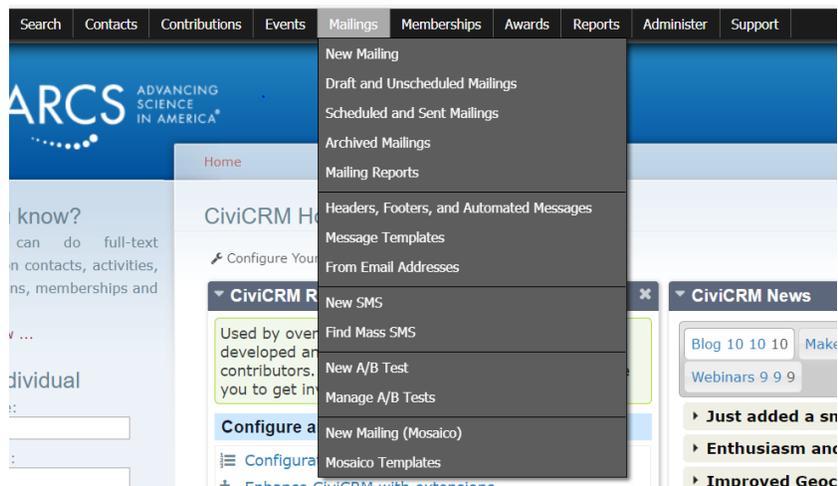
Using Mosaico

Setting up a mailing using an existing template

Mosaico uses the same underlying mailing system as CiviMail so the basic parts of setting up an email are the same. You need to give the mailing a name, decide who the email will be from and who to send the email to. When doing a Mosaico mailing you then start the email using a template. These steps are outlined in detail below.

Get Started

Choose “New Mailing – Mosaico” from the bottom of the “Mailings” drop down menu from the CiviCRM black bar menu.



Fill in the Mailing Form

The first step of creating a new mailing is to fill in the mailing form:

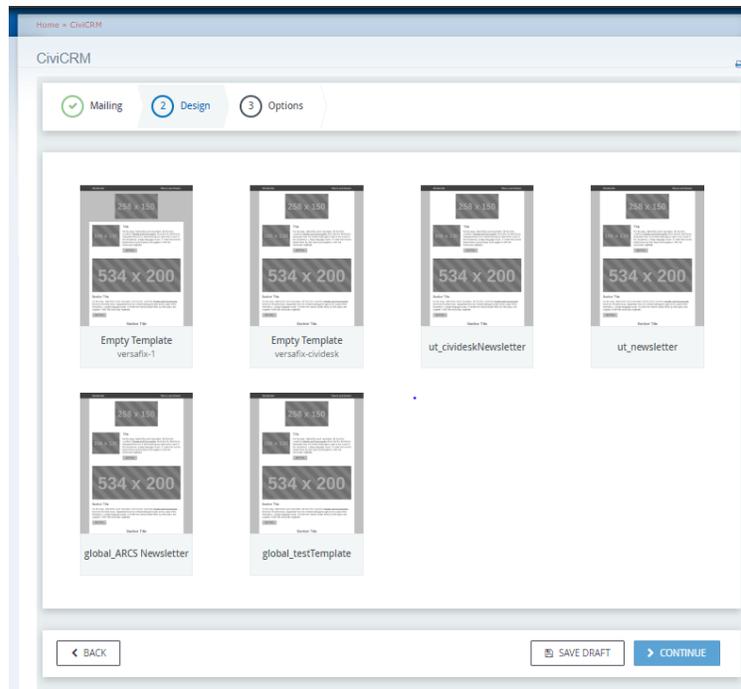
A screenshot of the CiviCRM 'New Mailing' form. The form is titled 'CiviCRM' and has three steps: '1 Mailing', '2 Design', and '3 Options'. The 'Mailing Name' field is empty. The 'From' field is set to 'ARCS Foundation' with the email address 'national@arcsfoundation.org'. The 'Recipients' field is set to 'Groups or Past Recipients' and shows 'No Recipients'. The 'Subject' field is empty. At the bottom, there are three buttons: 'DELETE DRAFT', 'SAVE DRAFT', and 'CONTINUE'.

- Mailing Name – Give the mailing a name that will make it easy for you to find. Mailings are site aware so you do not need to preface your mailing name with your chapter. Some chapters begin the name with the date (e.g. 20180602) so the mailings appear in order. If there are conventions in your chapter, stick to them with Mosaico mailings.
- From address – choose a “From address” from the drop-down list. Remember that we must have an email that ends with “arcsfoundation.org” for bulk mailings in CiviCRM.
- Recipients – This is just the same as in CiviMail. Choose the group or group(s) you want to have receive the mailing. Remember you can also choose a list to NOT send to by scrolling down and picking the group name with the red line through it. For example, you may want to send your email to all your members, but not those that have already registered for a meeting.
- Subject – This is the subject line your recipient will see. Note that there is no A/B testing for subject lines using Mosaico. It is on the “wish” list but is not available yet.
- Tokens -- This is the usual set of tokens available for mailings. Any tokens selected here will be inserted into the subject line.
- Press Continue

Choose a Template

Currently Mosaico is not terribly site aware. This means that template management will be challenging for the short term. Currently all chapters will see all templates from all chapters, BUT chapters can only use or edit their own templates. So it is important when choosing a template that you only use those templates that start with your chapter name or abbreviation (e.g., phx, mwc, uth). Templates for use by the National site will be prefaced with ntl or national. Those that are used to send emails to multiple chapters (like the national newsletter) will be named starting with “global”.

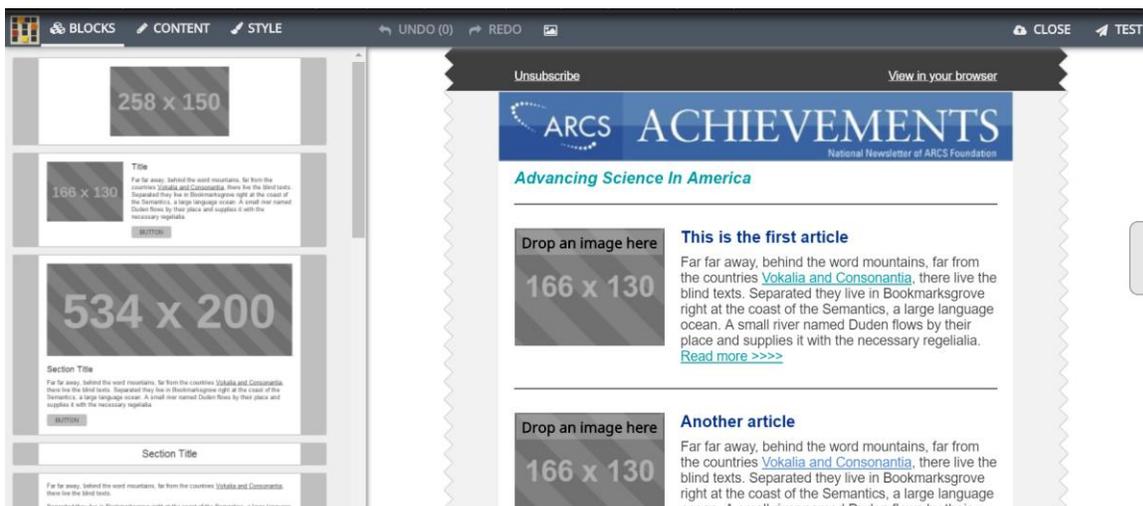
We have not made any templates for chapters to start. If you have no templates and want to go ahead and work on an email, pick the “Empty Template versafix-cividesk”. This will give you just the basic outline to start building an email. If you want to try making a template BEFORE you work on an email, skip down to the “Create a Template” section. The IS Committee is happy to assist with template creation and can help locate paid help if necessary for complex designs.



Using templates can make generating new emails quick and easy and helps maintain the “branding” across communications. In creating a template, please remember that we have a Style Guide to be used in all communications which ensures consistency in branding. This Style Guide can be found in two places in the Document Library: Document Library / National Library / Governance and Organizational Documents – National / Style Guide and in Document Library / National Library / National Media Library / ARCS Foundation Style Guide.

Edit the Design

When you choose a design, you will be presented with a two-part screen. On the left is a design tool box; on the right is your design.



Blocks

From the left hand side, you can scroll up and down to see the type of blocks that are available to choose from. You can either drag and drop a block from the left hand side to your design or click on the block you want to add on the blue “Add” button to have the block added to the design.

Once a block is in your design you can move it up and down using the arrows at the top of the block. On the right side you will see an icon that represents “Duplicate block” if you want to repeat the same block and there is a trash icon to remove the block from your design.

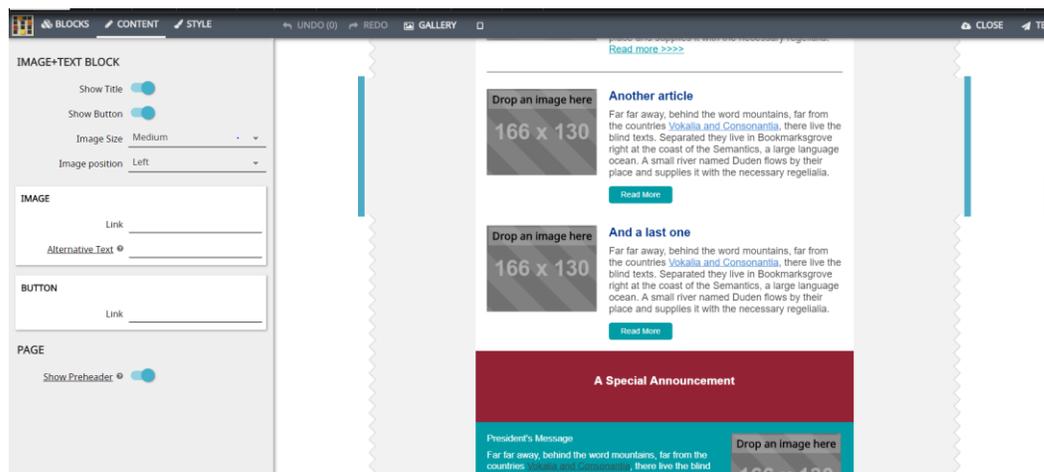
Blocks consist of content which can be turned off and on and styled using fonts and colors (refer to Style Guide).

Note the last block in the list has a list of all the social media platforms. You can turn on/off those that you want to use and insert the link to the site on the content tab.

Content

If you choose a block in your design and click on Content you will see sections for each element of the block that can be hidden if desired. So you can slide the Show Button, Show Title, Show Image sliders one way or the other to show or hide the element.

For each element in the block you will also see the fields where you can insert link addresses for buttons or pictures if you want those elements to transfer your readers to other documents or web pages.



Style

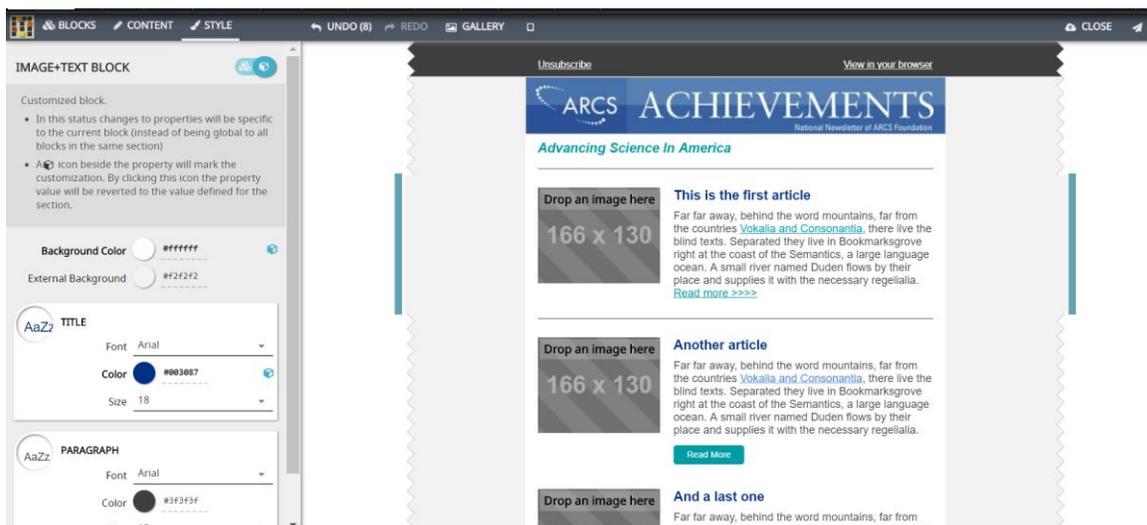
Text is edited right on the block by clicking in the area you want to edit. When editing a text element you will have a pop-up that has some controls that can be used to style the specific element you are editing.

When clicking on the left hand “Style” section you have two options. In the upper right corner there are two icons, one represents the “Main” style and one represents the “Block” style. If you have added several blocks to the design and choose the “Main” style you can assign colors and sizes to the Title for example and these changes will be reflected in all blocks currently in the design. If you want to affect only one block, click on that block and make sure the icon showing one block is chosen. Now when you

change colors and fonts these will only affect the current block. The image below shows the left-hand panel with the global option chosen. Any changes will affect all similar blocks in the design.



This figure shows the Style panel with the “single block” option chosen. You can see the caution at the top that these changes only apply to the current panel. Using the toggle, you can make global changes or local changes depending on what you want to accomplish.



Again, please remember to refer to the style guide in the National Document Library for the correct usage of the ARCS logo and the correct colors to use. The color chooser doesn't make it easy to pick specific colors so have these colors handy for pasting into your design: Dark Blue (#003087), Light Blue (#BFCBE1), Teal (#009CA6), Red (#9D2235), etc. This way you know you have the right color and will help us protect our “look” in public.

Images

Any place there is a box for an image you can add an image by clicking on the image in the block and then clicking on the upload icon. This will upload the image to the gallery and add it to your design. The box is pretty flexible and will adjust to most sizes. For blocks with both text and images side by side you can switch the order of the image by choosing “Right” or “Left” from the Content tool box for that block. There is also a small icon in the center of the block called “Switch Block Variant” and if there is an option for right or left, this will do the switch for you.

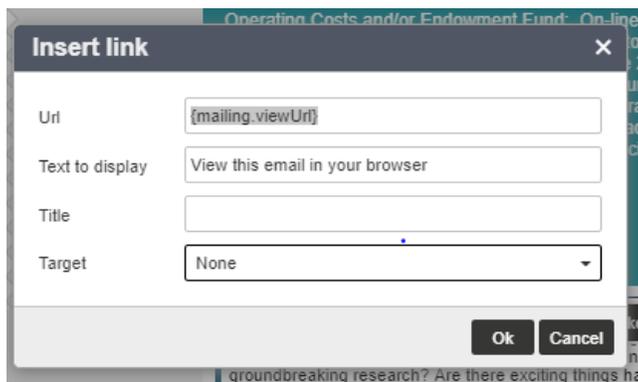
Once an image has been uploaded it is available to reuse by clicking on the “Gallery” icon at the top of the editing page. A new window opens with new tabs, one that just shows images recently uploaded and the other shows images from the Gallery. This Gallery is going to be interesting as right now it has no management tools. The only thing you can do is scroll down through the list and choose an image. There is no deleting, no searching, no ordering by name, etc. We will have to see how this works for us. If it becomes unwieldy we will work on a solution with the developers. In the meantime, if you are developing templates or mailings, you might want to keep them handy on your computer to upload if you can't easily find what you are looking for in the gallery.

Required components

All emails must contain the domain of origin (either arcs.foundation.org or your chapter domain), the opportunity for people to unsubscribe and the contact information for the chapter. At the top of the default mailing is the “pre header”. This header has built-in links for seeing the email in a browser and for unsubscribing. You can use this preheader or turn it off by using the “Show Preheader” slider on any block.

In any block with text you have a list of tokens to add the required tokens to your email. These pull things like your address, etc. from the CiviCRM data. Or you can just type them in as text. The requirements are the same as we are used to for CiviMail. If you are missing required components you will get an error message when trying to schedule the mailing. One advantage of using a template is that you can prepare the footer for emails and have it available for all future emails.

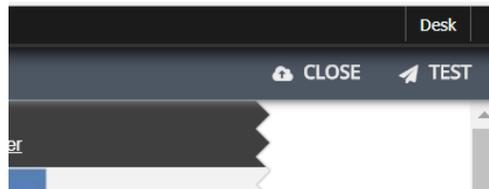
If you are not using the “pre header” with the built in link for “view in browser” you can add that in your footer using this token: {mailing.viewUrl}. For tokens such as this one and the unsubscribe tokens, the link that is generated in the email is not very attractive, so the best way to insert this type of token is to create text, e.g. “View this email in your browser” then highlight the text and select the “Link” option (the icon that looks like two links of a chain) and put the token in for the URL entry as shown below. This technique works for the unsubscribe options also.



The image shows a screenshot of a web editor's "Insert link" dialog box. The dialog is titled "Insert link" and has a close button (X) in the top right corner. It contains four input fields: "Url" with the text "{mailing.viewUrl}", "Text to display" with "View this email in your browser", "Title" which is empty, and "Target" which is set to "None". At the bottom right are "Ok" and "Cancel" buttons. The background shows a blurred view of a web page with text like "Operating Costs and/or Endowment Fund: On-line" and "groundbreaking research? Are there exciting things ha".

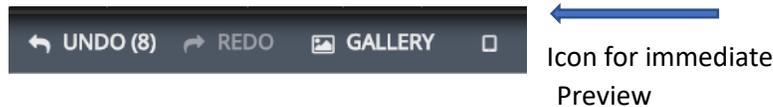
Saving Your Work

At any point when editing the mailing design, you can click on “Close” in the upper right-hand corner to save your design. **Frequent saving is critical** when doing extensive editing of a mailing design. We are hoping that an auto-save feature will be coming in a future release, but for now we must **SAVE FREQUENTLY!**

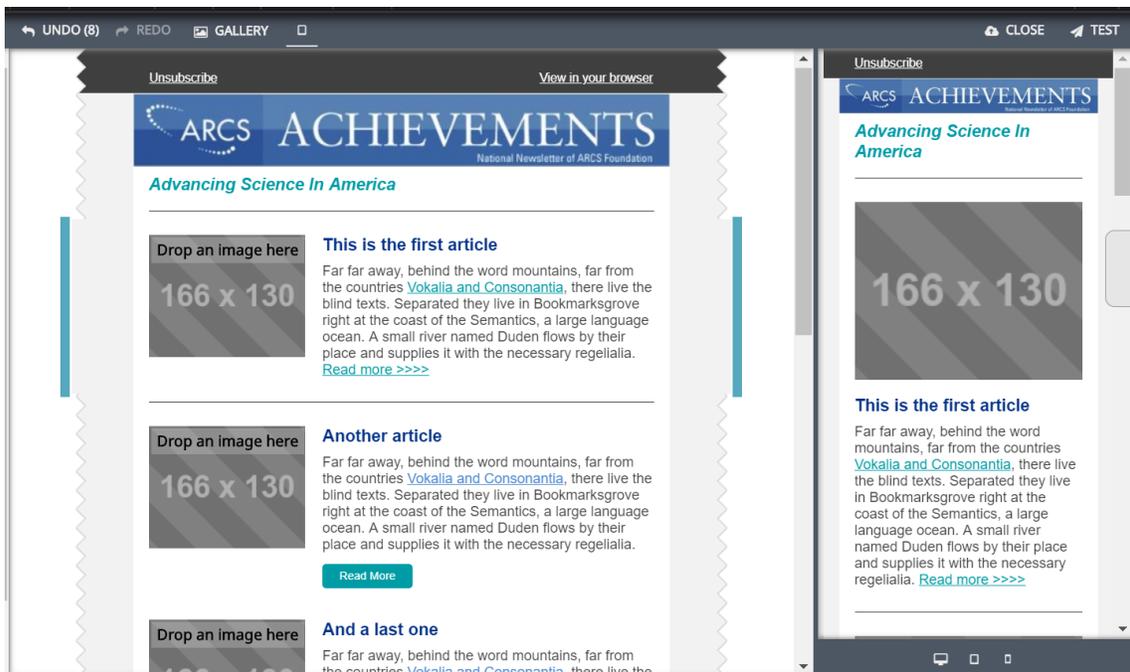


Previewing the Email

There is a small icon at the top center of the editing window that allows you to open a side panel with a view of the email in a variety of sizes. This is nice for checking your design for mobile devices, tablets or computer screens. Clicking on the button toggles the preview window on and off.



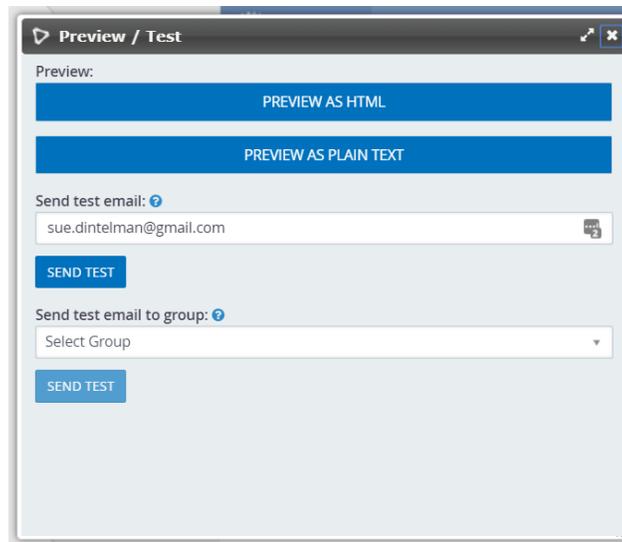
At the bottom of the preview screen are icons for the three different sizes. The image below shows the preview for a mobile device.



Testing the Email

While you are editing your design, you can test the mailing by choosing “Test” from the upper right-hand corner. You have an option to either “Preview as HTML” to see an immediate copy of the finished

mailing design as html or “Preview as Plain Text” to see the plain text version. You can also send the test email to an individual email address or to a group.



Finalize the Mailing

For the final step, “Options”, either select the option to queue the mailing to be done immediately or schedule it for a specific time. There are also “Advanced Mailing Options” available by pressing the button. The Advanced Options are like those in CiviMail allowing you to choose files for attachments, specify specific messages for user responses (opt-out, unsubscribe, etc.) and what tracking you would like for the email.

Saving Drafts

Just like with CiviMail you can at any time save a draft of your email to come back to later. You will find the draft by clicking on “Mailings” then “Draft and Unscheduled Mailings”. To get back to your design go to Step 2 and click on “Edit”.

What to do if you pick the wrong template

If you have picked a template from another chapter or just picked the wrong template from your chapter’s list you can reset the mailing by opening up the mailing, clicking continue to get to Step 2- Design and clicking the red RESET button that shows up if you hover over the template. You will be prompted to verify that you want to reset the template. Then you can choose a new template. Note that none of your text or images, etc. will be saved.

Creating templates

Currently all site admins can create Mosaico templates. Please help manage the templates by naming them starting with the chapter name or abbreviation. Once you have used a template in a mailing you can change or delete the template and it will have no affect on the mailing.

Spending time developing templates has two advantages. First you save time when doing a mailing by only having to edit the items that change. And second you can be assured that the standards your chapter and ARCS Foundation have developed are consistently followed.

To create a template, start by choosing “Mailings” and then “Mosaico Templates” and then choose a base template. You will see the same list of templates that you see when setting up a mailing. You can choose to create a new template by starting with the base template “versafix-cividesk” or if you have already created a template for your chapter you can create a new template by clicking “Copy” on an existing template. Remember that although you will see templates from other chapters, you will not be able to use them to create a new template for your chapter.

Once we have some experience with Mosaico we will decide as an organization if we want to share templates across chapters or have each chapter independently develop and manage their own templates. Right now, we have the worst of both options in that we can see all the templates from all chapters but can only use our chapter templates. But we should be able to decide in a few months which way we want to go.

Editing a template is exactly like editing the design in a mailing. The blocks can be added in the same way, options are set the same way and the style is applied the same way. The only difference is that you don't need to add text for the titles and body of blocks as these will be customized when a specific email is sent. But by setting up the framework for your emails with colors, logos, footers, etc., you can set up and send emails quickly and be assured that the ARCS brand and your chapter standards are being followed.

Mosaico Documentation

There is currently no documentation provided by the developer for Mosaico. This is a link to a webinar given by Sue Dintelman of the IS Committee for members on June 20, 2018. This webinar reviews the basic editing functions used to edit either an email or a template and reviews the process of creating an email using Mosaico from beginning to end. The webinar is on our YouTube channel at <https://youtu.be/R7hUojE1OI0>.

CiviMail Documentation

If you need a refresher on CiviMail, here is the documentation for that:

<https://docs.civicrm.org/user/en/latest/email/mass-mailings-using-civimail/>