

## Overview

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Email is a great way to communicate with your alumni and donors. It's agile, it can be interactive, and it has lower overhead than print mail. Our constituents are also becoming more and more interested in cutting down their carbon footprint by receiving less paper and more e-communication. We now have a way of effectively collecting email information directly from our alumni, donors, and friends.

We've created a tool that leverages the Convio API to allow people to sign up from your website, directly into your Convio groups and interests and manage their email preferences for both your center and the entire UW. By calling one iframe tag, you are able to place a form in your page that handles all of the information gathering and processing.

Below, you'll find information on what this form does, how it works, and how you can implement it on your site. If at any time you need any help or have questions about the form, please contact Advancement's STI Team ([advsti@uw.edu](mailto:advsti@uw.edu)).

### Features

- **Direct Sign Up** - The form signs up users directly to your Convio center, interest, and/or group.
- **Subscription Management** - Users can add or remove themselves from subscriptions and update their contact information.
- **Easy Implementation** - All that is required on your site is one iframe tag with an embedded IF statement.
- **User Friendly** - The form has instructions for the user every step of the way, even upon errors.
- **Email Confirmation** - The form sends an email to the user via the email address provided. The user is not signed up until they follow the link provided in the email.

## How It Works

By placing this iframe on your webpage you are actually creating a small window that is rendering content from the Foundation's web server. You can think of the iframe as a webpage contained inside another webpage. The iframe contains a dynamic page that presents itself as a form for email sign up and subscription management. Signing up is a multi-step process for the end user...

1. Fill out the form and hit submit
2. Receive a confirmation email to the address provided
3. Click the link in the email
4. The web browser is redirected back to the original page
5. They see a message confirming their signing up

In the background there are several intermediate steps that are invisible to the user...

1. Fill out the form and hit submit

- a. Check to make sure the form is completely filled out. Display an error if it's not
  - b. Generate an MD5 hash id number based on their email address and the current time
  - c. Write all of the provided information to a database on the UW Foundation server
  - d. Generate and send an email with a link to the hosting page containing their unique id
  - e. Display a message to the user telling them to expect the confirmation email
2. Receive a confirmation email to the address provided
  3. Click the link in the email
  4. The web browser is redirected back to the original page
    - a. The id number is detected and passed to the iframe's url
    - b. The form looks up that number in the database
    - c. The email address from the record is sent to Convio using the Convio APIs
    - d. Convio checks to see if that email already exists in the system
    - e. If only one record exists, it adds that record to the designated centers, groups and/or interests
    - f. If the record doesn't exist, then it creates a new one with the information from the form
    - g. If multiple records exist, then the form sends an email to the Advancement STI team informing them of the duplicate record
  5. The constituent sees a message confirming their signing up

All along the way, the form is checking to make sure that each step has worked properly. If at any point there is an error, the form stops what it's doing and displays an error message to the user, prompting them to email our support account.

## Technical Details

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Now that you know what it does, it time to look at how you can employ the tool on your own site.

### Dissection of the Iframe Tag

We've designed the iframe to be as modular and flexible as possible. To accommodate as many people using this tool as possible, we've created ways for you to customize where it signs people up to. Let's take a look at how you can implement it on your own site.

The tag is broken into six parts...

- HTML Tag
- Base URL
- Variables for subscription management form
- Server side code
- Iframe Attributes
- Error Text

You can see where these parts are below...

```
<iframe  
src="http://www.uwfoundation.org/convio/subscription_management.asp?centerID=####&signupInterestId=##  
##&signupGroupId=####,####&id=<?php/asp?>&ref=http%3A%2F%2Fexample.com&fromName=STRING&fromE  
mail=STRING " scrolling="no" frameborder="0" style="width: 100%; height: 675px; overflow: auto; background:  
url("http://uwfoundation.org/imagelib/sub_manage_loading.gif") no-repeat 50% 100px;">Error text</iframe>
```

The HTML tag and the base URL portions should be left alone, but you are free to alter the iframe attributes and the error message as you see fit. By default, the frame displays without a border and 100% the width of its parent element to a minimum of 470 pixels and a maximum of 600 pixels. The background image is set to a loading animation that is also hosted on the UW Foundation server. The error text is what will be displayed in a browser that doesn't support iframes. You can use regular html tags in this space to style your error message.

The subscription management form accepts six variables from the src of the iframe which determine its appearance and behavior...

- **centerID** - (eg. 1234) - This determines the scope of the tool for the end user. This will also tell the tool to add users to your Convio center population. Each center in Convio has an associated numerical id. If you need help finding this number, please contact Advancement's STI Team ([advsti@uw.edu](mailto:advsti@uw.edu)). If this parameter is left blank, the management tool will display available email subscriptions for the entire University. *Note: leaving in the pound signs will result in an error.*
- **signupInterestId** - (eg. 1234,5678) - This is the comma separated list of the interest(s) to sign up users to when they log in to the tool. Each interest in Convio has an associated numerical id which can be found when viewing the details of that interest. *Note: leaving in the pound signs will result in an error.*

- **signupGroupId** - (eg. 1234,5678) - This is the comma separated list of id(s) of the group(s) to sign up users to when they log in to the tool. Each group in Convio has an associated numerical id which can be found when viewing the details of that group. *Note: leaving in the pound signs will result in an error.*
- **id** - (eg. 6e0066f53a5b8a1ae23a0aaf6db94a0d) - This is the id used by people returning to the page from the confirmation email. The form generates this number itself based on the persons email and time that they visited the form. This field will be dynamically populated. Read more below...
- **ref recommended** - (eg. http%3A%2F%2Fexample.com) - This is the url encoded url of the page the iframe is to be hosted on. It's there to ensure the proper workings of the confirmation email mechanism.
- **fromName optional** - (eg. UW Email Sign Up) - This sets the from name for the confirmation email. If nothing is provided, the default is "UW Email Sign Up."
- **fromEmail optional** - (eg. give2uw@uw.edu) - This sets the from email address for the confirmation email. If nothing is provided, the default is give2uw@uw.edu.

## The ID Variable

The ID variable is required only at the time of the confirmation. When the form sends a confirmation email, it generates a link that contains the url of the hosting page and a unique id key that identifies that person. Alternatively, a valid ID can be generated in Convio allowing direct login access to the end user. If you wish to do this, please contact Advancement's STI Team ([advsti@uw.edu](mailto:advsti@uw.edu)).

The id number needs to be passed to the url of the iframe from the url of your referring page. This requires a simple statement in your server language of choice. Below are two examples.

```
<iframe src="http://www.uwfoundation.org/convio/subscriber2.asp?centerID=1234&signupInterestId=1234&signupGroupId=1234&id=
```

**ASP:** `<% response.write request.querystring("id")%>`

**PHP:** `<?php echo $_GET ["id"] ?>`

```
" scrolling="no" frameborder="0" style="border: none; width: 100%;"></iframe>
```

Though the syntax is slightly different in each example, they both do the same thing. If the url of the page calling the iframe contains in the query string "id=5678", then "5678" is added to the url of the iframe. The subscription management form is designed to take a different set of actions if there is an id number present. This is why we only send it in the iframe's url if it they are following the link from the confirmation email.

## Setup/Testing Notes

### Admin Records

When you're setting up and testing your new form, you will be tempted to use your own email address. If your email address is attached to an Administrator account in Convio, you will receive a generic "Error 1: Unable to process request." This is due to the fact that Convio does not allow admin records to be changed externally or in

bulk, as it may affect the permission levels of said admin. The Convio API does not have a specific error number for this event and only returns Error Code 1.

### **Pound Signs**

If you have left pound signs (#) in the url string of the iframe, the form will not work properly. Replace the pound signs with your center/interest/group ids or remove them and leave the variable blank to fix the form.

# Installer Helper

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The Advancement STI team has created a javascript snippet that will handle the installation of the iframe for you. Copy and paste the following code onto your page and change the variables to match your particular needs. For help, contact Advancement's STI Team ([advsti@uw.edu](mailto:advsti@uw.edu)).

\*\*\*NOTE: When copying and pasting, the top script tag should be a single line from '<script ' to '</script>' with no line breaks.

```
<script type="text/javascript"
src="https://support.gifts.washington.edu/Convio/SubscriptionManagerGenerator.js"
id="uwSubscriptionManager"></script>
<script type="text/javascript">
  //Note: Make sure to leave the id value on the proceeding script block.
  makelframe({
    centerID : 1081,           //REQUIRED: Convio Center ID
    interestID : 9381,       //REQUIRED: Interest ID people will be signing up to
    groupID : 85821,        //OPTIONAL: Group ID people will be entered into
    fromName: "EthnoMed",   //OPTIONAL: From Name of the confirmation email
    fromEmail : "ethnomed@uw.edu", //OPTIONAL: Email address of the confirmation email
    fullManager : true      //OPTIONAL: True shows full subscription manager
  });
</script>
```

And here's an example of signing up multiple groups and interests at the same time.

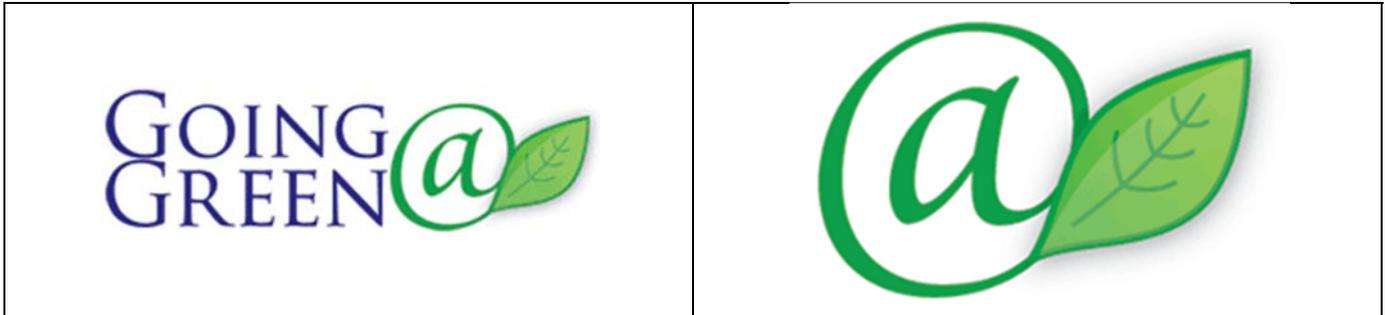
```
<script type="text/javascript"
src="https://support.gifts.washington.edu/Convio/SubscriptionManagerGenerator.js"
id="uwSubscriptionManager"></script>
<script type="text/javascript">
  //Note: Make sure to leave the id value on the proceeding script block.
  makelframe({
    centerID : 1081,           //REQUIRED: Convio Center ID
    interestID : [9381, 9382], //REQUIRED: Interest ID people will be signing up to
    groupID : [85821, 85820], //OPTIONAL: Group ID people will be entered into
    fromName: "EthnoMed",   //OPTIONAL: From Name of the confirmation email
    fromEmail : "ethnomed@uw.edu", //OPTIONAL: Email address of the confirmation email
    fullManager : true      //OPTIONAL: True shows full subscription manager
  });
</script>
```

## Wrapping Up

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### Art Pack

We've also created a small art pack to help market the subscription management tool, centered on the green aspect of email. Included here are two logos that you are free to use in your instance of the tool.



### Comments or Questions

We hope that this tool is something that interests you and fits your email needs. If you have any questions, comments, or feedback please contact Advancement's STI Team ([advsti@uw.edu](mailto:advsti@uw.edu)).