



# Cheetah Loyalty Email Templates

## *Developer Guide*

Version	Date	Description	Reviewed / Approved by
1.0	August 2019	Initial release	Cheetah Digital Product Management
1.1	September 2021	Added version history	Cheetah Digital Product Management



**Cheetah Digital, Inc., 72 W Adams St 8th floor, Chicago, IL 60603**

**Copyright © 2021 Cheetah Digital, Inc.**

**All rights reserved.**

Printed in the United States of America

No part of this publication may be stored in a retrieval system, transmitted, or reproduced in any way, including but not limited to photocopy, photographic, magnetic, or other record, without the prior agreement and written permission of Cheetah Digital, Inc.

Cheetah Digital, the Cheetah Digital logo, and other Cheetah names referenced herein are trademarks of Cheetah Digital, Inc., and may be registered in certain jurisdictions.

Other product names, designations, logos, and symbols may be trademarks or registered trademarks of their respective owners.

**PRODUCT MODULES AND OPTIONS.** This guide contains descriptions of modules that are optional and for which you may not have purchased a license. As a result, your software implementation may differ from descriptions in this guide. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Cheetah Digital sales representative.

**U.S. GOVERNMENT RESTRICTED RIGHTS.** Programs, Ancillary Programs and Documentation, delivered subject to the Department of Defense Federal Acquisition Regulation Supplement, are “commercial computer software” as set forth in DFARS 227.7202, Commercial Computer Software and Commercial Computer Software Documentation, and as such, any use, duplication and disclosure of the Programs, Ancillary Programs and Documentation shall be subject to the restrictions contained in the applicable Cheetah Digital license agreement. All other use, duplication and disclosure of the Programs, Ancillary Programs and Documentation by the U.S. Government shall be subject to the applicable Cheetah Digital license agreement and the restrictions contained in subsection (c) of FAR 52.227-19, Commercial Computer Software - Restricted Rights (June 1987), or FAR 52.227-14, Rights in Data—General, including Alternate III (June 1987), as applicable. Contractor/licensor is Cheetah Digital, Inc., 72 W Adams St 8th floor, Chicago, IL 60603.

**PROPRIETARY INFORMATION NOTICE**

Cheetah Digital considers information included in this documentation and all Cheetah Digital documents to be Confidential Information. Your access to and use of this Confidential Information are subject to the terms and conditions of: (1) the applicable Cheetah Digital software license agreement, which has been executed and with which you agree to comply; and (2) the proprietary and restricted rights notices included in this documentation.



# Contents

<b>Introduction</b>	<b>4</b>
Sample Email Templates	4
Template Sets	4
Testing Email Templates	5
<b>Creating a Template Set</b>	<b>5</b>
Step 1 - Create an email template file	5
Step 2 - Add the main Layout and Template	5
Step 3 - Add Editable Sections	6
Heading	6
Subheading	6
Body	6
Details	7
Action	7
Primary Image	7
Styles	7
Step 4 - Color Palettes	7
Step 5 - Add Dynamic Content sections	8
Step 6 - Add Content Tokens	8
Special Email Tokens	8
Custom Tokens	8
Links	9
Sample Template Set	9
<b>Advanced Topics</b>	<b>12</b>
Configure Dynamic Section to Render a Reward Based on Member's Preference	12



## Introduction

This is a guide to creating Cheetah Loyalty email templates. Cheetah Loyalty Email messages are based on reusable email templates. The email template sets the email structure, such as tables for layout, header/footer. The template defines editable sections for the marketer to enter custom content into a specific email.

Email templates define the following:

- Header (logo, links, snippet, "view in browser" etc.)
- Footer (address, unsubscribe link, etc.)
- Structure of the email, such as tables (should be responsive)
- Default color palette
- Personalized content tokens
- View in Browser link (usually in header)
- Unsubscribe link (usually in footer)
- Content sections where the marketer can create ad-hoc content for a specific email
- Dynamic content sections where the marketer can insert Cheetah Loyalty content, such as offers and challenges

## Sample Email Templates

Cheetah Loyalty provides sample responsive HTML templates already pre-installed in the program environment. These are great examples and you should review them prior to attempting to create your own templates. The simplest is a "blank" email template with a single large editable section for the marketer to enter any content they want. However, this increases the amount of email testing the marketer must perform, since any layout might behave differently across email clients. So, it is better to create templates which guide the marketer on where content should be placed.

## Template Sets

Cheetah Loyalty templates are grouped into **Template Sets**, which are named and versioned so that marketers can easily choose the template they want to use. Each Cheetah Loyalty Template Set is an HTML file uploaded into the Cheetah Loyalty Marketing Console (in Admin > Content > Template Sets). Since the Template Sets are so flexible, most customers only use a single email Template Set.



## Testing Email Templates

Emails need to look professional and correct across various email clients. Therefore any custom templates need to be tested carefully. There are three parts to this:

1. UploadTemplateSet. When uploading a Template Set file, the file will be parsed and some validation performed to ensure it meets the required structure/syntax. This does not ensure that the email will look good, only that it can minimally be parsed and used by the Cheetah Loyalty.
2. ContentEditor. Cheetah Loyalty emails have a content editor which uses a Template Set to allow marketers configure their email contents before reaching their target audience. The content editor loads and parses the Template Set, so any syntax or structural errors/bugs in the Template Set can result in problems in the content editor. Therefore, it is important to test that a custom template appears and behaves correctly in an email content editor before turning it over to the marketers for use.
3. EmailClients. Test emails using the template in common email clients. Note that email templates built by Cheetah Loyalty (standard or as a service) will have been tested using Litmus before being delivered to the customer.

## Creating a Template Set

Template Sets are HTML files which will be uploaded into the Cheetah Loyalty Marketing Console. Template Sets are required to follow certain rules for structure and syntax, so that the file can be parsed and used in Cheetah Loyalty. This section will guide you in building your own template set.

### Step 1 - Create an email template file

This is an HTML document; the only mime type supported is .html extension, e.g. "email\_template\_set.html". You can use whatever text editor and source code repository you prefer, but word processors (e.g. MS Word) should never be used for writing code.

### Step 2 - Add the main Layout and Template

Wrap your template in Cheetah Loyalty layout and template markup as shown below. Whatever is inside this wrapper will appear in your email. All of the following code is required for every email template.

```
<div layoutId="email_body" layoutWidth="660" layoutMinHeight="1000"
layoutEmailSafe="true" layoutFixedTools="true" class="stl_layout">
  <h1><i class="fa fa-envelope-o"></i> Email Body</h1>
  <div templateId="email_body_1" class="stl_template">
```



```
<h2>Email Template 1</h2>
<div class="stl_content" style="width: 100%; min-width: 600px
!important;">
    <!------- TEMPLATE CONTENTS HERE ----->
</div>
</div>
</div>
```

Note that you can optionally have more than one template, which would be an additional HTML element like this:

```
<div templateId="email_body_newsletter" class="stl_template"> ... </div>
```

### Step 3 - Add Editable Sections

You may define configurable sections in the editor by using the ff. sections. These must be placed inside the `<div class="stl_content"></div>` wrapper, and only one of each is allowed.

Editable Sections are defined by a CSS class on an HTML element. Adding the CSS class "stl\_heading" to a DIV instructs the content editor to let the marketer edit the contents of that DIV. Thus, the template developer can choose where the marketer should write copy and add images.

#### Heading

```
<div class="stl_heading"></div>
```

#### Subheading

```
<div class="stl_subheading"></div>
```

#### Body

The body is the main content area.

```
<div class="stl_body"></div>
```

To enable more advanced editing controls in the content editor use **mainbody** instead of **body**. This is often appropriate if the email has a single, large editable section such as for a newsletter or "blank" template.

```
<div class="stl_mainbody"></div>
```



## Details

Details are used for the fine print at the bottom of the message such as offer details.

```
<div class="stl_details"></div>
```

## Action

The "action" is the the Call to Action (CTA).

```
<div class="stl_action"></div>
```

## Primary Image

```
<div class="stl_image1"><img src=""></div>
```

Put the class "stl\_image1" on an IMG element or the containing element.

## Styles

Templates support custom CSS styling. However, note that you may still need to add inline CSS styles for older email clients that do not support the <style> tag.

```
<style id="email_style" type="text/css"></style>
```

## Step 4 - Color Palettes

Hardcoding colors into templates can prevent them from being reused, so Template Sets support Color Palettes.

A Color Palettes is a set of colors that work together. Each palette has foreground and background colors for the heading, subheading, body, details, and action.

Add colors to your template by using CSS classes as shown below, for the foreground and background color. Note that frequently the background color should be placed on an HTML element wrapping the content element.

```
<div class="stl_heading_bgcolor"><span class="stl_heading  
stl_heading_color"></span></div>
```

In addition, we can also set a default palette to the whole layout by adding the paletteId="id" attribute on top of the layout html element. e.g.

```
<div templateId="default" class="stl_template" paletteId="black">
```



## Step 5 - Add Dynamic Content sections

```
<div sectionId="email_section1" layoutId="medium_email_section"
class="stl_section stl_dynamic_content" contentType="" contentFilter=""></div>
```

Legends:

### **layoutId**

Instructs the editor to get the contents from a set value. Default is set to medium\_email\_section contents

### **contentType**

Identifies the type of object you want to add. This is a dropdown option, but you can specify the default value. Values can be offers, rewards, challenges, content blocks and placements.

### **contentFilter**

This can either be the internal name of the object or a specific tag.

## Step 6 - Add Content Tokens

Content tokens are variables used for personalization as well as some special links such as "View Web Version" and "Unsubscribe".

### Special Email Tokens

These tokens are standard and always available. Most emails should include all of them.

```
<a href="#" class="stl_snippet">My awesome preheader has value</a>
<a href="#" class="stl_web_version">View Web Version</a>
<a href="#" class="stl_unsubscribe">Unsubscribe</a>
```

### Custom Tokens

You can create your own tokens in the Cheetah Loyalty Marketing Console. This allows you to define these variables in a single place and reuse them everywhere, such as the user's first name, point balance, or tier.

```
<span class="stl_token_first_name">Bob</span>
<span class="stl_token_point_balance">1000</span>
```



Content Tokens support merge expressions, including handlebars syntax, so they can build up strings using business logic. For example, you can build a salutation such as "Hello Bob!" as a content token.

```
<span class="stl_token_welcome_email_salutation">Hello Bob!</span>
```

As a point of style, always build strings within Content Tokens, and avoid building strings within the template. This allows the marketers to easily change and translate the content token, and avoids unnecessarily ugly or fragile syntax in the template.

```
YES <span class="stl_token_email_salutation">Hello Bob!</span>
NO  <span>Hello <span class="stl_token_first_name">Bob</span>!</span>
```

## Links

Create each link URL as a Content Token in the Cheetah Loyalty Marketing Console, and set Apply To = Link. Then apply the token class to the link A REF or to the parent DOM element inside the template. The link token always applies to the entire HREF attribute. There is not a way to insert content tokens inside the HREF; this is by design for the aforementioned reasons for all custom tokens.

```
<a href="#" class="stl_token_profile_link">Manage Your Profile</a>
```

-OR-

```
<div class="stl_token_profile_link"><a href="#">Manage Your Profile</a></div>
```

You can optionally give each link a friendly link name by giving the link an HTML attribute of "stl\_link\_name", such as stl\_link\_name="profile". Links will otherwise be automatically assigned names in the format "link1", "link2", etc..

```
<a href="#" class="stl_token_profile_link" stl_link_name="profile">Manage Your Profile</a>
```

## Sample Template Set

```
<!-- Email Body -->
<div layoutId="email_body" layoutWidth="660" layoutMinHeight="1000"
layoutEmailSafe="true" layoutFixedTools="true" class="stl_layout">
<h1>Email Body</h1>
<!-- start email_body_1 -->
<div templateId="email_body_1" class="stl_template">
  <h2>Email</h2>
  <div class="stl_content" style="width: 660px;">
```



```
<!-- stl_content -->
<style id="email_style" type="text/css">
  div, p {
    font-family: 'Open Sans', arial, sans-serif;
    font-size: 14px;
    font-weight: 400;
    font-variant: normal;
    color: #000;
    line-height: 24px;
  }
  a:link {
    color: #97130F;
  }
  a:visited {
    color: #C51C16;
  }
  a:hover {
    color: #666;
  }
  a:active {
    color: #666;
  }
  .signature {
    font-size: 13px;
  }
  .header *, .footer * {
    font-size: 12px;
    font-family: 'Open Sans', arial, sans-serif;
    font-weight: 400;
  }
</style>
<div style="margin-top: 10px; font-family: 'Open Sans'; font-size: 14px;
font-weight: 400; font-variant: normal; color: #000; line-height: 24px">
  <table width="600" border="0" align="center" cellpadding="0"
cellspacing="0">
    <tr>
      <td colspan="3" class="header" style="text-align: right;
padding: 0 10px 5px 0;">
        <div><a href="#" class="stl_web_version
stl_token_webversion">View web version</a></div>
      </td>
    </tr>
    <tr>
      <td colspan="3"><span class="stl_image1"></span></td>
    </tr>
    <tr>
      <td width="20">&nbsp;</td>
    </tr>
  </table>
</div>
```



```
<!-- CONTENT SECTION 1: "inline" -->
<div sectionId="email_section1" style="width:600px;"
layoutId="medium_email_section" class="stl_section">
  <div class="stl_heading stl_heading_bgcolor
stl_heading_color" style="font-size: 26px; letter-spacing: 2px; padding:
10px;"></div>
  <div class="stl_subheading stl_subheading_bgcolor
stl_subheading_color" style="font-size: 20px; padding: 10px;"></div>
  <div class="stl_mainbody stl_body_color"
style="width:640px; min-height: 40px; padding: 10px;"></div>
</div>
</td>
<td width="20">&nbsp;</td>
</tr>
<tr>
  <td colspan="3">
    <!-- CONTENT SECTION 2: "primary offer" -->
    <div sectionId="email_section2" style="width:600px;"
layoutId="medium_email_section" class="stl_section stl_dynamic_content"
contentType="blank" contentFilter="" style="margin: 20px 0 20px 0;"></div>
  </td>
</tr>
<tr>
  <td colspan="3">
    <!-- CONTENT SECTION 3: "secondary offer" -->
    <div sectionId="email_section3" style="width:600px;"
layoutId="medium_email_section" class="stl_section stl_dynamic_content"
contentType="blank" contentFilter="" style="margin: 20px 0 20px 0;"></div>
  </td>
</tr>
<tr>
  <td colspan="3"></td>
</tr>
<tr>
  <td colspan="3">&nbsp;</td>
</tr>
<tr>
  <td width="20">&nbsp;</td>
  <td align="center" class="footer">
    <p class="stl_operational_hidden">
      This email was sent to <span
class="stl_token_email">you</span> based on your preferences.<br />
      <a href="#" class="stl_unsubscribe
stl_token_update_subscription">update communication preferences</a> /
      <a href="#" class="stl_unsubscribe
stl_token_unsubscribe">unsubscribe</a>
    </p>
```



```
<p>Pure Fishing, Inc. 7 Science Court, Columbia, SC 29203<br
/>
    Pure Fishing, Inc. All rights reserved.
</p>
</td>
<td width="20">&nbsp;</td>
</tr>
<tr>
<td colspan="3">&nbsp;</td>
</tr>
</table>
</div>
<!-- stl_content -->
</div>
</div>
<!-- end_email_body_1 -->
```

## Advanced Topics

### Configure Dynamic Section to Render a Reward Based on Member's Preference

To personalize dynamic content sections, we can apply a content token to the content filter option of the section to apply different filters based on the user's preference.

```
<div sectionId="email_section1" layoutId="medium_email_section"
class="stl_section stl_dynamic_content stl_token_favorite_reward"
contentType="rewards" contentFilter=""></div>
```

Take note that you have to set the "Apply To" setting of the content token to *contentfilter*. It's a special setting that instructs the system to replace the contentfilter attribute at runtime.