

Quick Start Guide
Creating & Editing a New eDM



Quick-start Guide: Creating and Editing a New eDM

Introduction

This Quick-start Guide will take you through, step-by-step, the actions required to create and edit the three basic types of eDM files – existing template, HTML and Message Template emails. The Guide is intended for beginners with little to no experience with Portrait Dialogue.

Good luck, have fun and remember if you get stuck or have any questions you can always email Sarah at Spark – sjfowler@spark.com.au

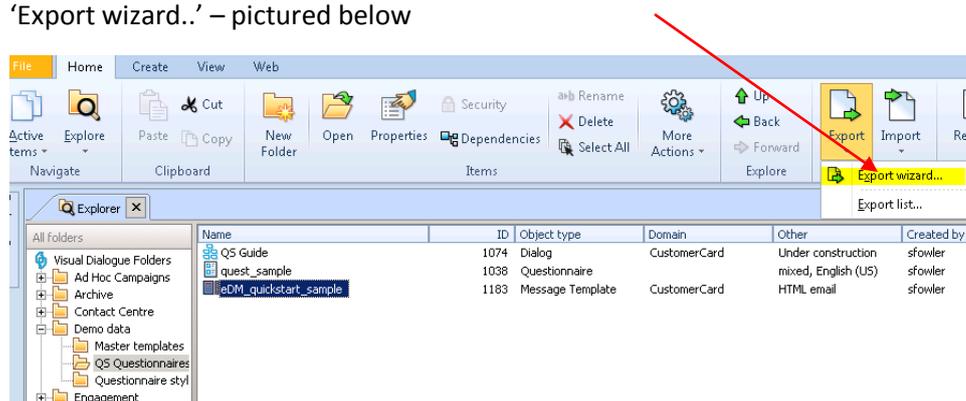
Stage 1: Create a new eDM file

There are three different methods to create a new eDM file in Portrait Dialogue:

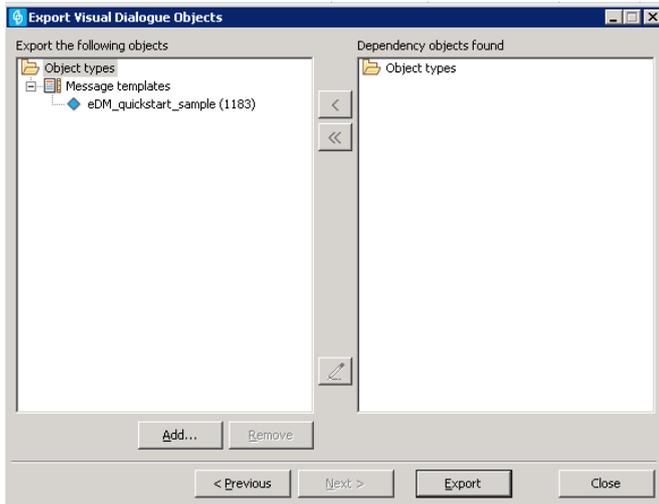
- 1. Export then import an existing HTML template to then edit**
 - a. Most highly recommended option to choose. This option is best if you already have an eDM template that has been used before, are still happy with it, and simply need to change some of the content text and/or images.
- 2. Create a new HTML email**
 - a. Best option if you have created your email in HTML code using an external program, and you simply need to copy and paste the code into Portrait Dialogue.
- 3. Create a new email using Message Template Designer**
 - a. You don't have as much design freedom with this option and unfortunately the programming can be very fiddly and tedious – however if you do not have any existing template to work with and are not familiar with HTML code, then this option is best suited for you. *(Instructions on how to create an eDM using this method will be given in this Quick-start Guide, however for instructions on how to edit please refer to Visual Dialogue User Manual and Help button; alternatively you can contact Spark for further information.)*

OPTION 1: USE AN EXISTING HTML TEMPLATE

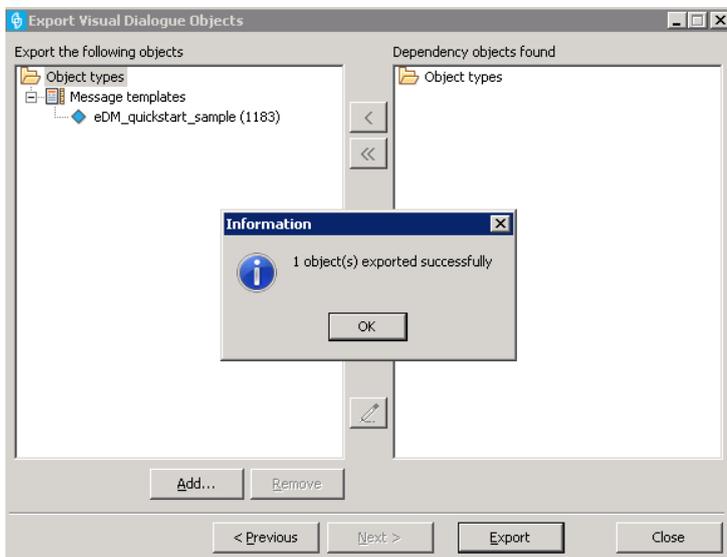
1. Go to the 'Home' tab in the top navigation bar, then click on the 'Export' button and select 'Export wizard..' – pictured below



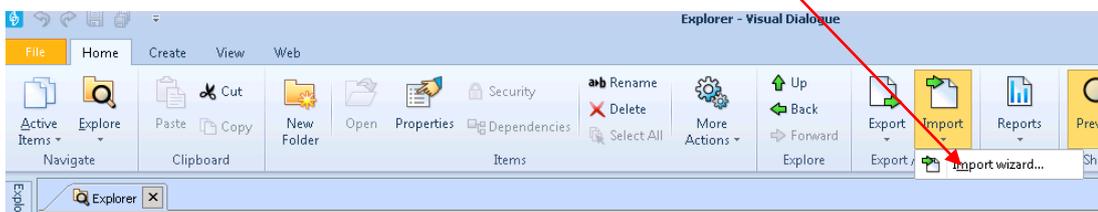
- Simply click 'Export' on the next window that pops up.



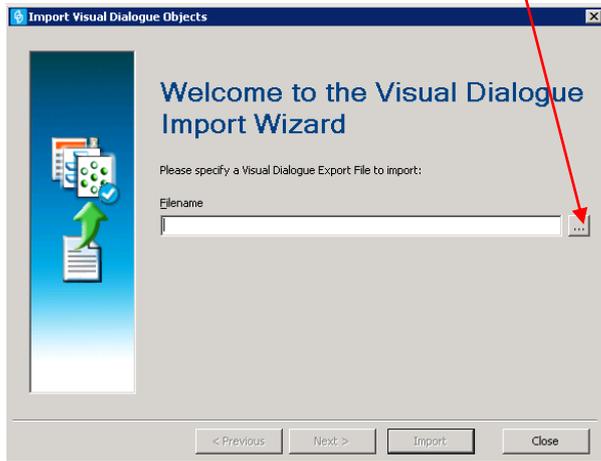
- In the next window, select a place to export the eDM file to. This could be as simple as a folder on your Desktop.
- The following pop up will now appear confirming the export. Simply click 'OK' to close. Then close the previous window also.



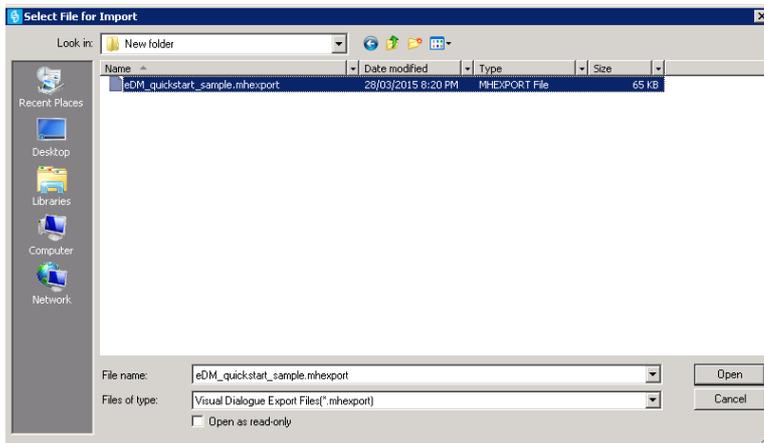
- Now head to the Dialogue folder that you would like to import the eDM file to and click on it. *An easy way to think of this process is that we are just copy and pasting a file from one folder to another – unfortunately we can't do that though – so we Export then Import.*
- Next you go to the 'Home' tab, click on the 'Import' button and select 'Import wizard..'



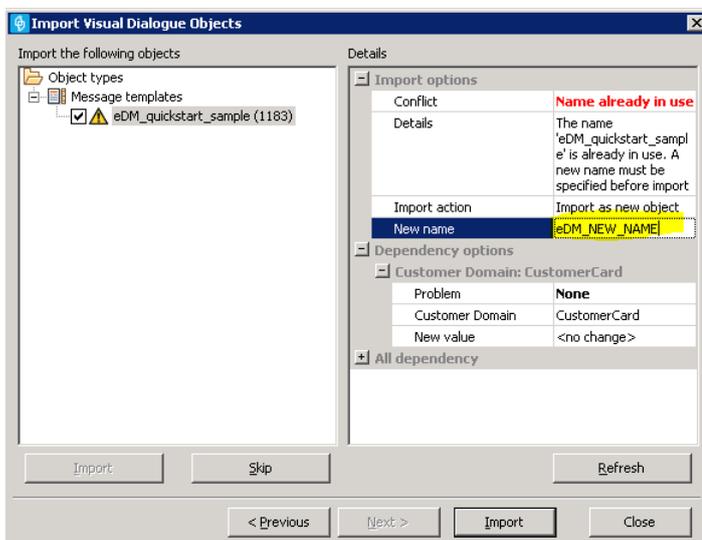
7. In the window that pops up, click on the ‘...’ box to find and select the email file that you just exported.



8. Select the file and click ‘Open’. Then in the window that appears next, simply click ‘Next’.



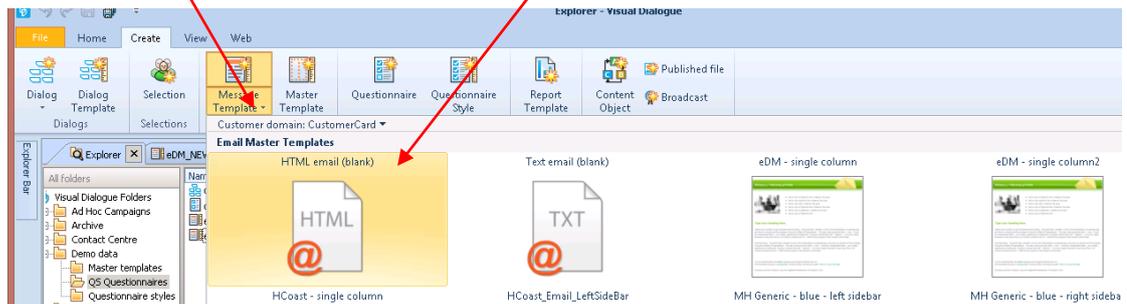
9. The following window will pop up showing a warning icon to notifying you to change the name of the email file as it already exists. Simply click in the field to the right of ‘New name’ and enter a new name. Click ‘Refresh’ and the warning will go away. Leave all other fields as they are and click ‘Import’.



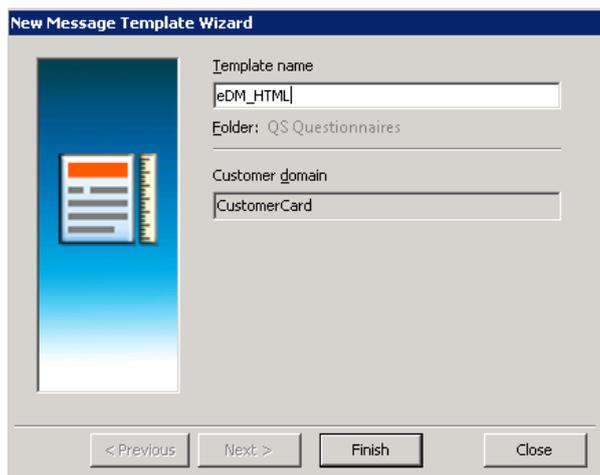
10. Double-click on the new eDM file and you are ready to edit it!

OPTION 2: CREATE A NEW HTML EMAIL

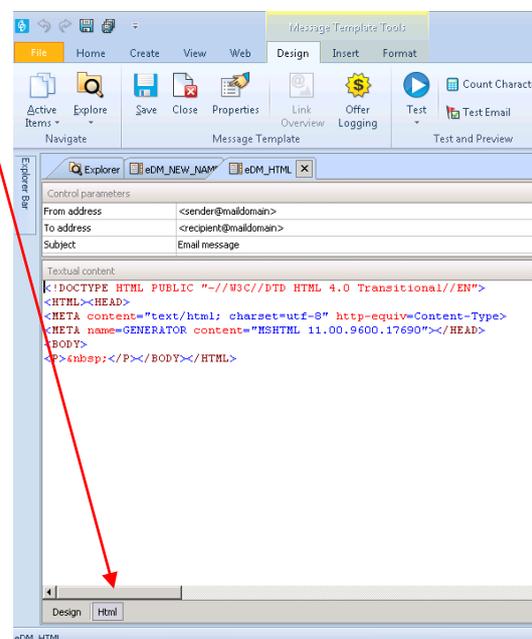
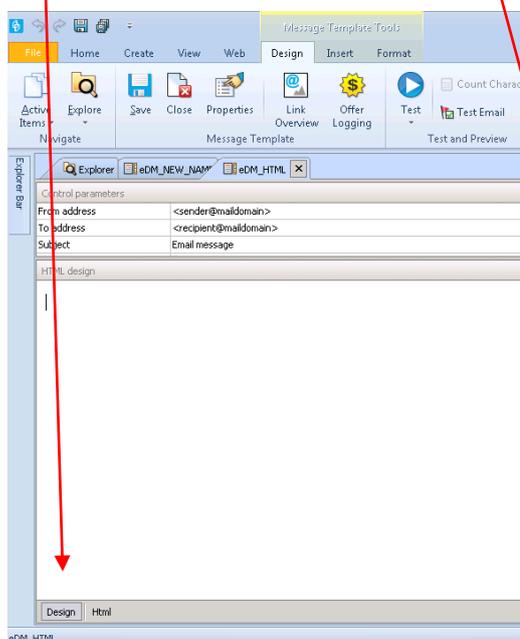
1. Go to the 'Create' tab in the top navigation bar, then click on the bottom half of the 'Message Template' button and select the 'HTML email (blank)' option – pictured below



2. Give your new HTML email a name in the Wizard window that pops up then click 'Finish'.

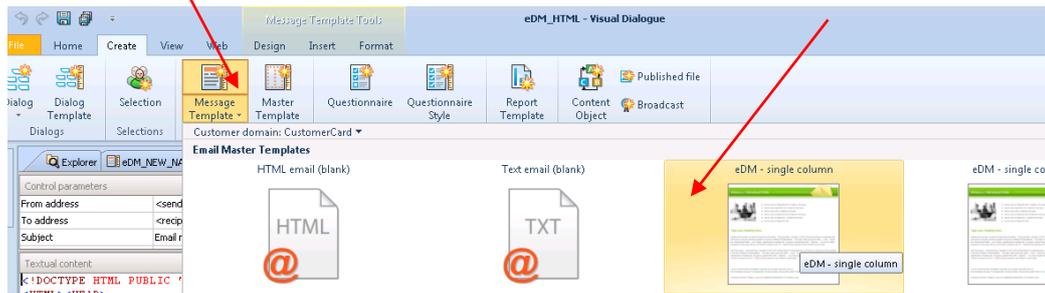


3. You now have your new HTML email open and ready to edit. You can edit directly in the 'Design' tab, or edit the code in the 'HTML' tab.

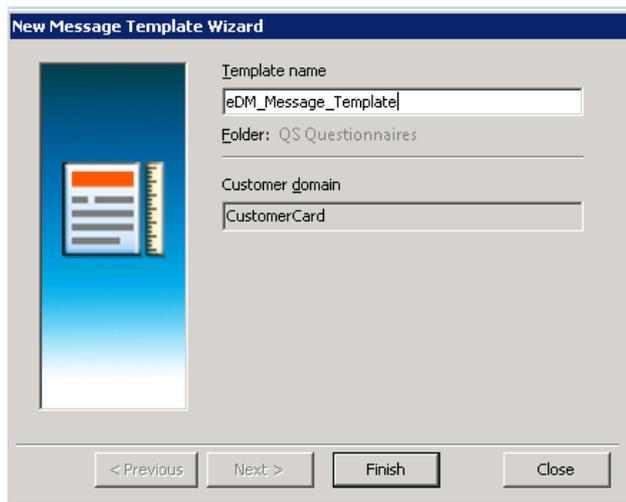


OPTION 3: CREATE A NEW EMAIL USING MESSAGE TEMPLATE DESIGNER

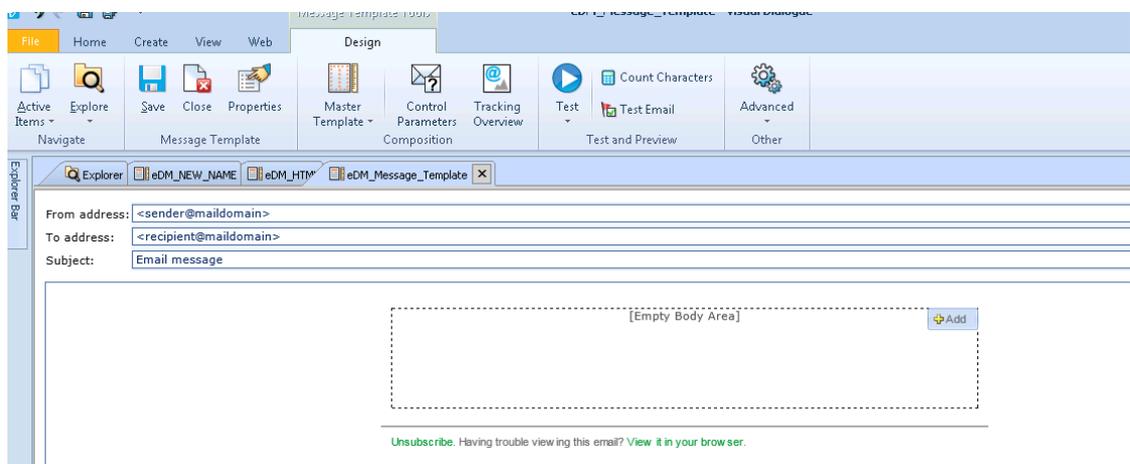
1. Go to the 'Create' tab in the top navigation bar, then click on the bottom half of the 'Message Template' button and select the 'eDM – single column' option.



2. Give your new eDM Message Template email a name in the Wizard window that pops up then click 'Finish'.



3. You are now presented with a screen that looks like the picture below and are ready to create and edit your new email.



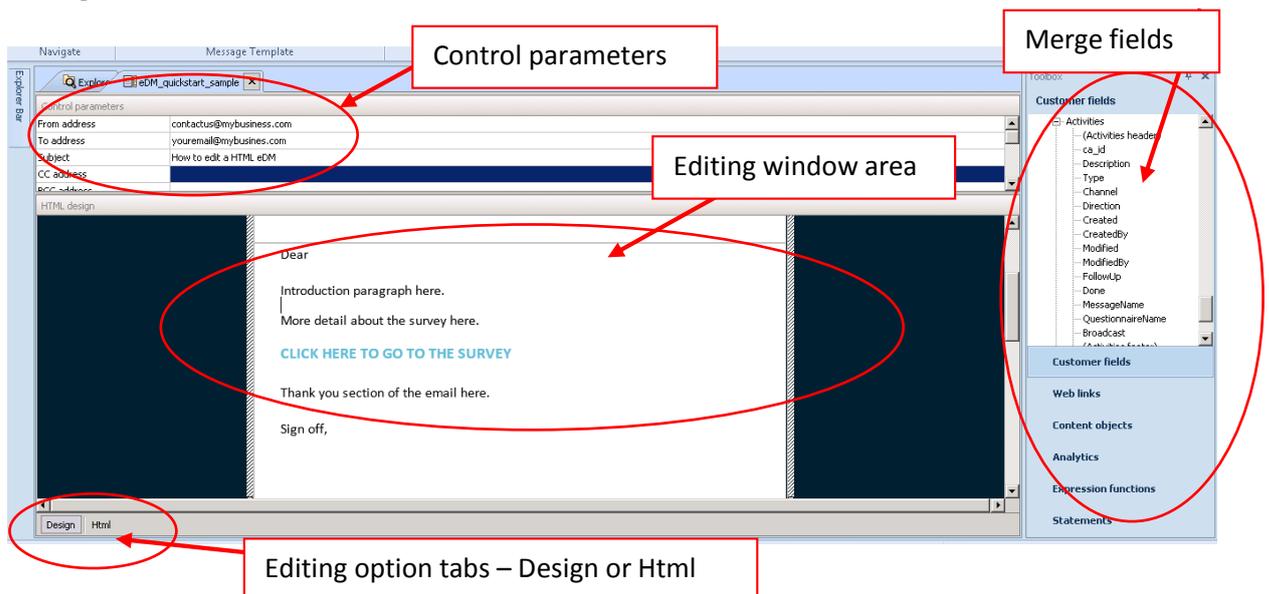
Stage 2: Editing your new eDM

How you edit your new eDM file will depend on whether it is an HTML eDM or an Email Marketing eDM. If you used:

- An existing HTML template or created a new HTML email then you have an HTML eDM.
- A Message Template to create your eDM, then you have an Email Marketing eDM.

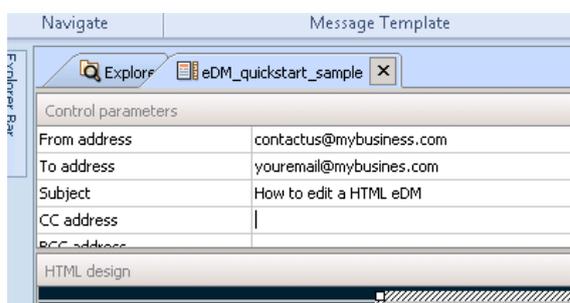
OPTION 1: EDITING AN HTML EDM

1. First, let's get familiar with a few areas of the editing eDM screen – we will refer to this throughout the rest of the Guide.

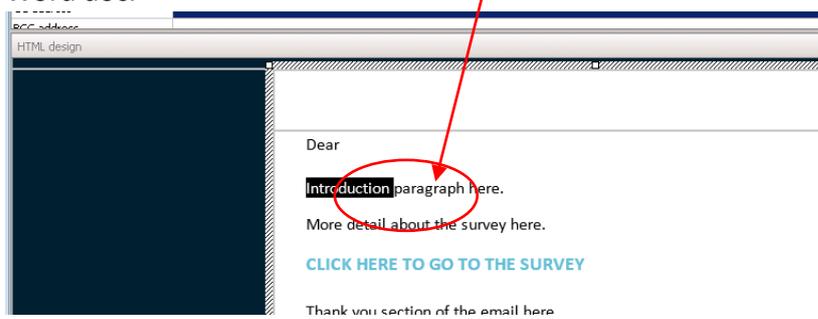


2. Next, select the tab that you want to use to directly edit your eDM. You can use both tabs to edit interchangeably.
3. Now you're ready to edit! The following is a list of some basic formatting actions available to use when designing and editing your eDM.

ENTERING YOUR 'CONTROL PARAMETERS': This is where you type in your To, From and email Subject information. To start with, enter your own email address in the 'To address' - as you will most likely want to test the email to yourself. Once you are happy with your eDM, then you can put in the merge field that picks up your customers' default email, e.g. <<email_default>>.

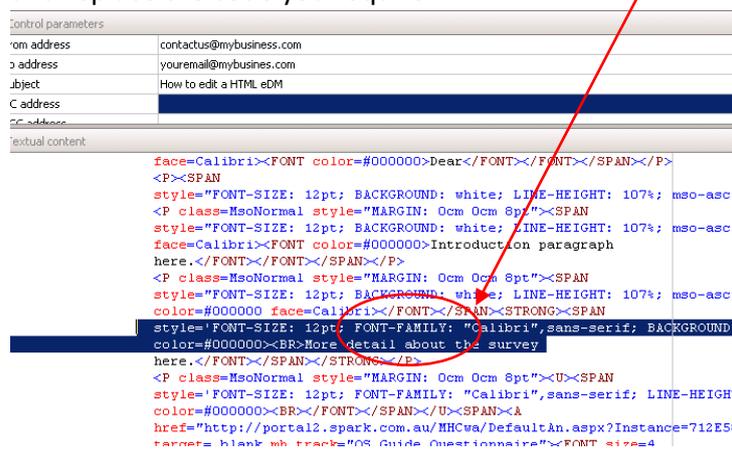


EDITING TEXT WITHIN YOUR EDM: If you are using an existing template, simply highlight the text that you would like to replace and either type it in, or paste it from an external Word doc.

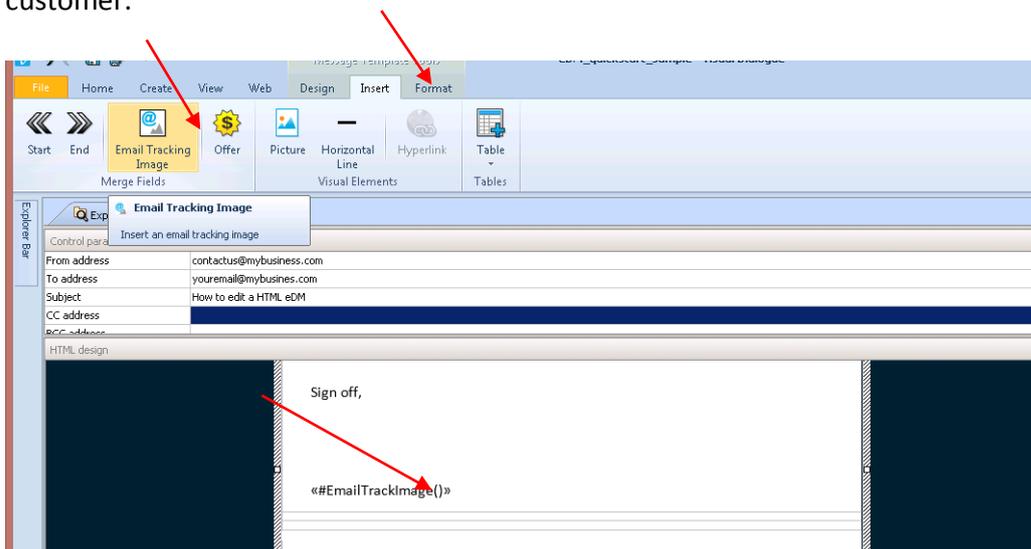


If you are starting with a blank HTML template, simply type your text in, or paste it from an external Word doc.

If you prefer, you can also edit the coding directly through the HTML tab. Simply highlight and replace the code you require.

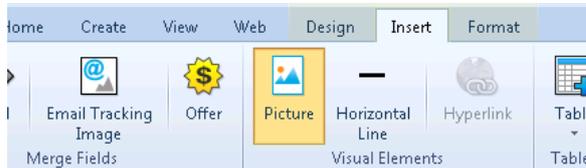


INSERTING AN EMAIL TRACKING IMAGE: You can track when an HTML email is opened by your customer. To enable tracking, click on the 'Email Tracking Image' button in the 'Insert' tab – pictured below. This will put an expression function in your template, which will be replaced by a tiny image during the merge process. The image cannot be seen by the customer.

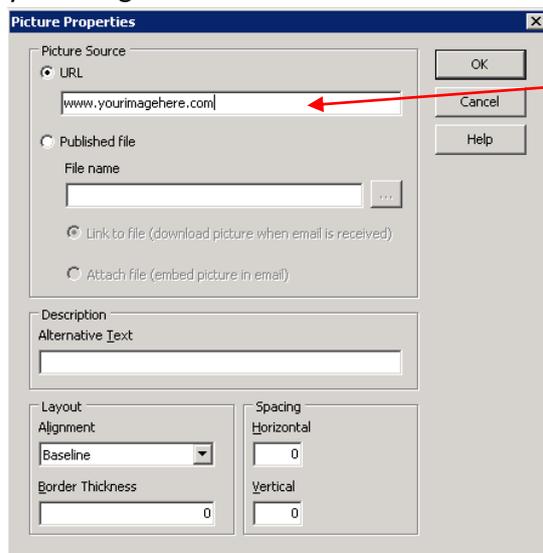


INSERTING IMAGES: There are two ways of inserting images into your HTML email; by directly adding a URL of an image that is already available on a web server; or by inserting a Published File. A Published file is a file (in this case, a picture) that is stored by the Dialogue Server. Below are the steps involved for both methods.

INSERTING A URL LINKED IMAGE: Click on the 'Picture' button from the 'Insert' tab – pictured below.

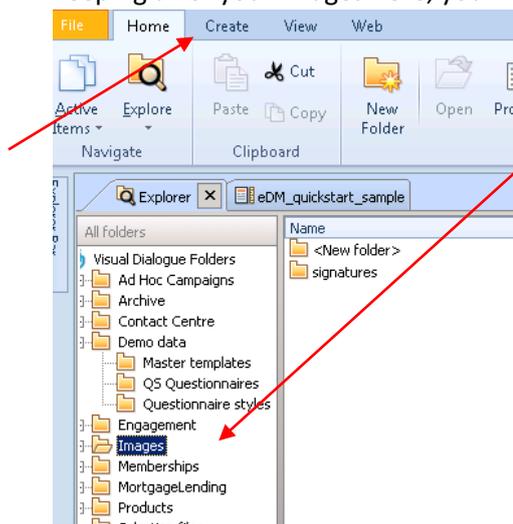


Enter or paste in the URL of your image. Leave all other options as they are and click 'OK' - your image will now be inserted.

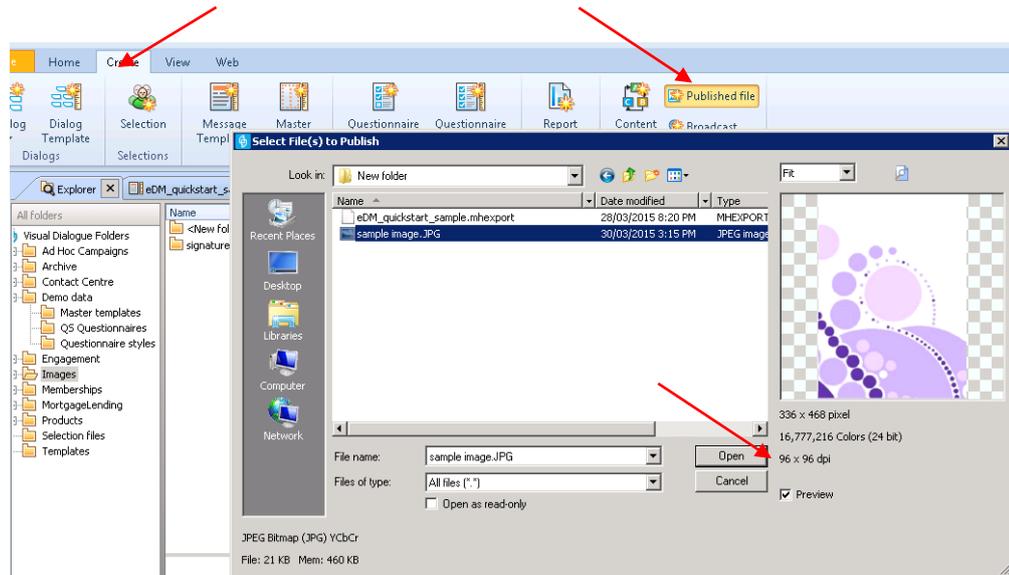


INSERTING A PUBLISHED FILE IMAGE: First you will need to create a Published File.

- a. **CREATE A PUBLISHED FILE:** Go to the 'Home' tab and select the 'Images' folder from your list of folders. If you don't already have an images file, create a new one. By keeping all of your images here, you will be able to retrieve much easier later.



Once in your 'Images' folder click on the 'Published File' button in the 'Create' tab. In the properties window that pops up, simply find your required image and click 'Open'.

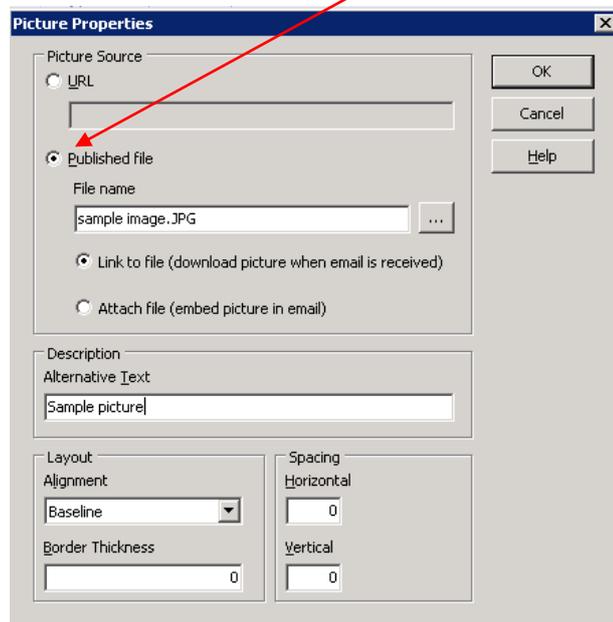


Your new picture file should now be saved. You can go back to editing your eDM file.

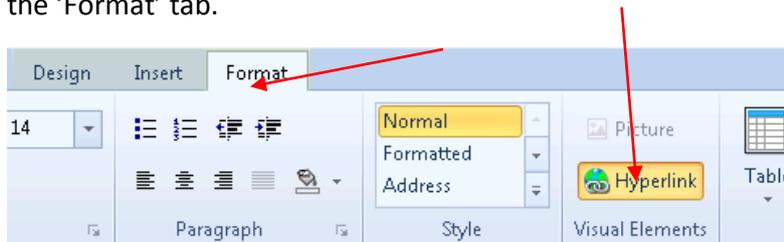
b. **INSERT THE FILE IN EDM:** Click on the 'Picture' button from the 'Insert' tab.



In the Picture Properties window that pops up, click on the 'Published File' radio button and search for the image you want to insert – it will be found in the Images folder within the Visual Dialogues folder. Next, enter any text that you would like to be visible if the picture cannot be viewed by the customer. Leave all other options as they are and click 'OK' - your image should now be inserted.



HYPERLINKING TEXT: Highlight the text you want to link, then click on the 'Hyperlink' button in the 'Format' tab.



Follow the instructions below when the Hyperlink properties window pops up.

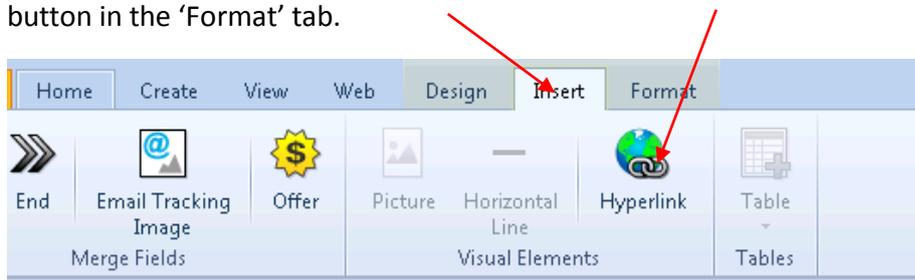
Leave as it

Enter the URL you want to link to

Check both of these boxes

Select a name from the dropdown box or type in a new one

HYPERLINKING IMAGES: Highlight the image you want to link, then click on the 'Hyperlink' button in the 'Format' tab.

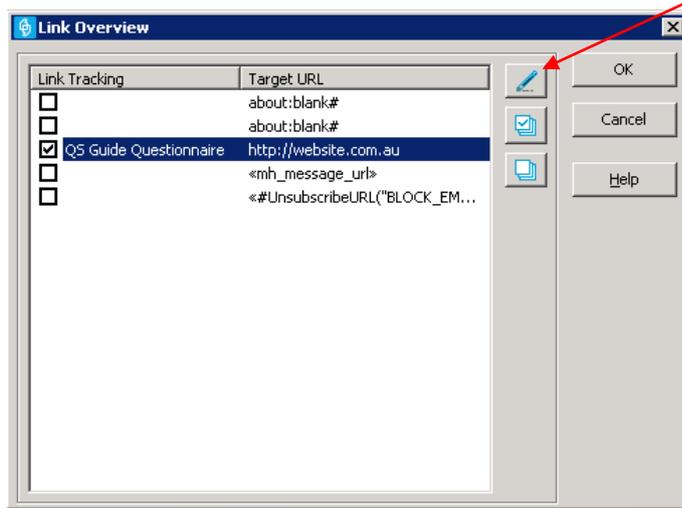


Follow the instructions as mentioned in the section above to complete the Hyperlink properties window that pops up.

TRACKING LINKS WITHIN AN EDM: You have the option to track which recipients actually click on links. There are two ways to do this: either enable link tracking for a link in the Hyperlink window (as shown in the examples above), or manage several links at once in the Link overview window. To access the Link overview window, click on the 'Link Overview' button in the 'Design' tab – pictured below.



The properties window pops up will show a complete list of all the hyperlinks in your email. Simply check the box next to the links that you want to be tracked. You can edit the hyperlink details by selecting the link and clicking the edit 'Pencil' icon – pictured below.



ADDING A 'VIEW ONLINE' LINK: It is highly recommended that you add a link to enable your recipient to view the EDM online to optimise the appearance. To insert a hyperlink to view the email, choose 'Web links' in your Toolbox (right hand side of page) and choose 'View email in Customer Web'. The default text of the link is 'Click here if you cannot read this email', but you can change it to anything you like – such as 'View Online'.

ADDING AN 'UNSUBSCRIBE' LINK: It is a legal requirement in Australia to include a link allowing the recipient to unsubscribe from receiving promotional emails. To insert an unsubscribe link, choose 'Web links' in your Toolbox and choose 'Unsubscribe'. The default text of the link is 'Unsubscribe'.

Don't forget to click 'Save' when you are done!

CONGRATULATIONS! You have now created and edited your first HTML EDM.

