

# Quick-start Guide: Creating and Editing Message Templates

## Introduction

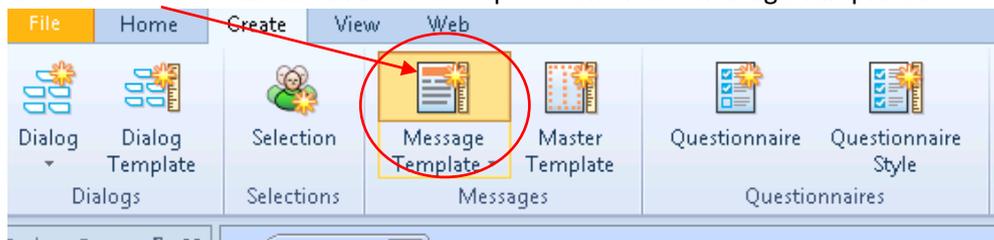
Message templates are the basis for producing messages in Visual Dialogue. When the system produces a message, it starts with a message template and then merges customer information into the template to make a complete message.

There are four main types of Message Templates you can create in Portrait Dialogue; Email, Letter, Facebook, and SMS. This Quick-start Guide will take you through, step-by-step, the actions required to create each of these types. It is intended for users that are familiar with Portrait Dialogue (even only as a beginner) and have a basic understanding of creating a Dialogue.

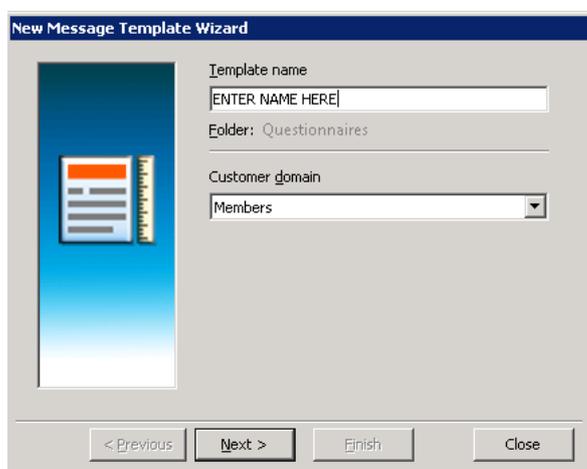
This information is just a starting point to help you discover the many functionalities that Portrait Dialogue offers in terms of message creation. Good luck, have fun and remember if you get stuck or have any questions you can always email Sarah at Spark – [sjfowler@spark.com.au](mailto:sjfowler@spark.com.au)

## Stage 1: Creating a new message template

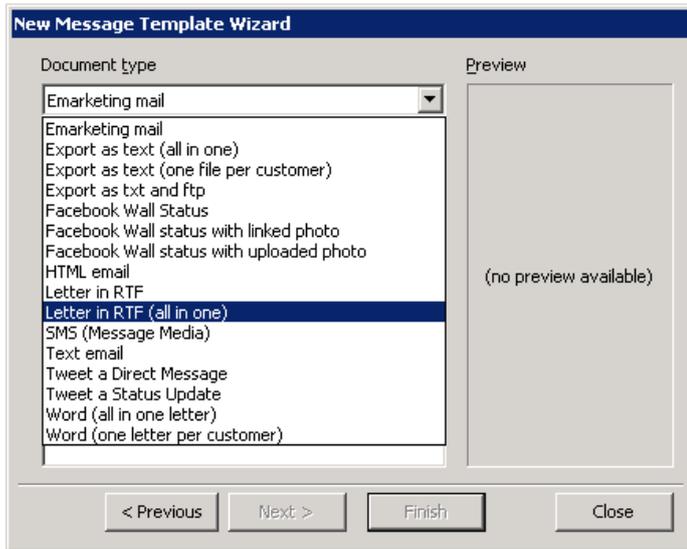
1. Go to the 'Create' tab and click on the top section of the Message Template button.



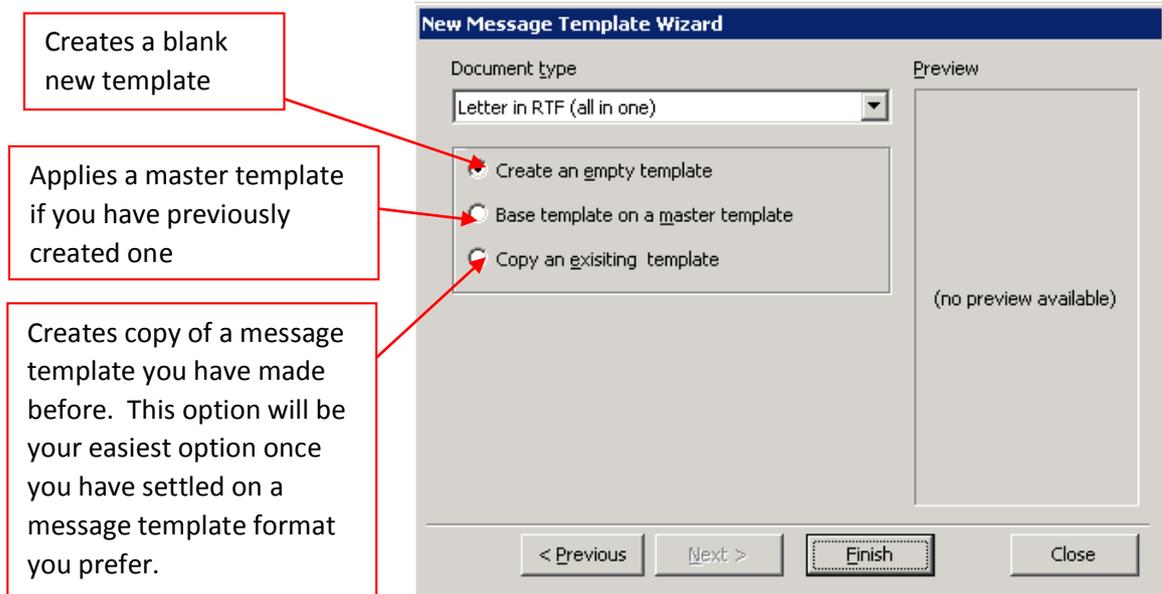
2. When the New Message Template Wizard appears, give your message template a name and click 'Next'.



3. Select your Document type from the drop down box – pictured below – but don't click 'Finish' just yet. The most common document types you will use will be; HTML email; Letter in RTF (all in one); SMS; and Facebook Wall Status.



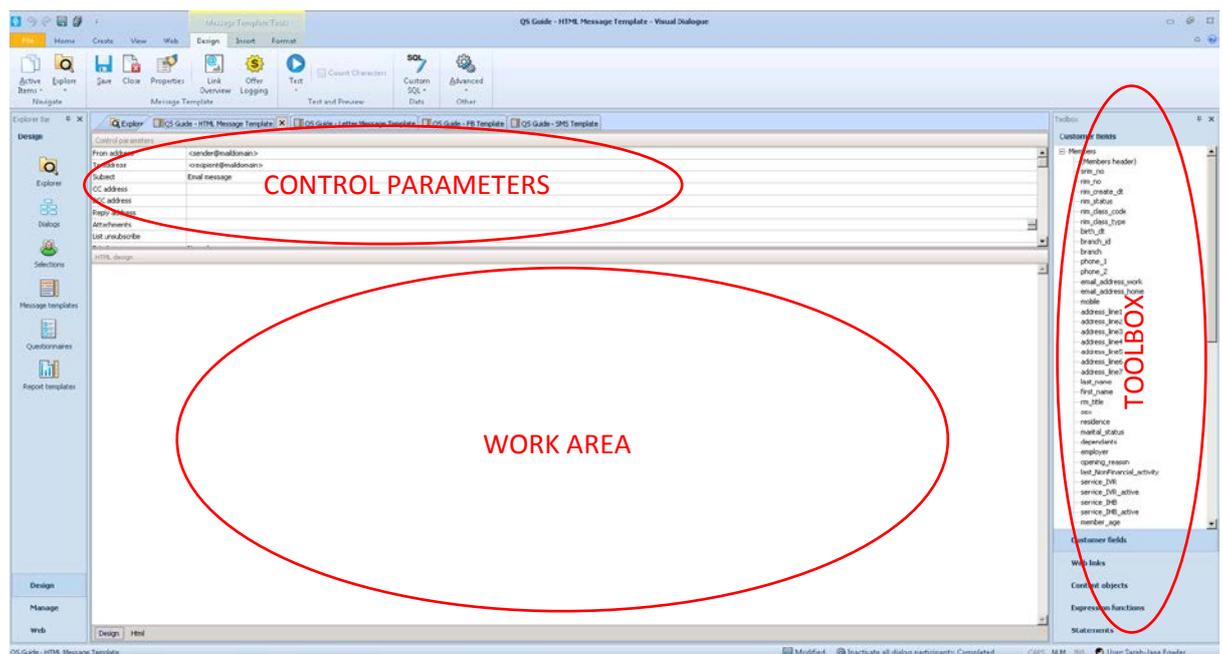
4. In the same window, select how you want to create your message template (empty, master or existing), then click 'Finish'.



## Stage 2: Editing your new message template

1. Get familiar with the Message Template Designer window. Once you have created your new message template, you will be presented with the Message Template Designer window – pictured below. There are three main areas: the **work area** in the middle where you design the template, the **control parameters** at the top which is used to control the message you produce and the **toolbox** at the right which provides quick access to merge fields. Take some time to look through the merge fields you have available – there are a number of customer, content object and web links fields that you will find useful when personalising your templates.

The screenshot example below is of a HTML message template, however you will find that all other templates follow very similar design guidelines.



2. Now you're ready to edit! The following is a list of some basic formatting actions available to use when designing and editing your message template.

### ENTERING YOUR 'CONTROL PARAMETERS' FOR:

- **Email Templates:** This is where you type in the 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>>.

| Control parameters |                        |
|--------------------|------------------------|
| From address       | <sender@maildomain>    |
| To address         | <recipient@maildomain> |
| Subject            | Email message          |
| CC address         |                        |
| BCC address        |                        |
| Reply address      |                        |
| HTML design        |                        |

- **SMS Templates:** This is where you input your Recipient and From information. To start with, enter your own mobile number address in the 'Recipient' field – this is just for testing purposes. Once you are happy with your SMS, then you can put in the merge field that picks up your customers' default mobile, e.g. <<mobile>>.
- **Facebook Templates:** This is where you input your username and access token information.

| Control parameters |                    |
|--------------------|--------------------|
| Recipient          | <<mobile>>         |
| From               | Your Business Name |

Textual content  
Text message here

| Control parameters    |   |
|-----------------------|---|
| Facebook access token |   |
| Facebook username     |   |
| Location              | (Enter the Facebook Page Id for the Location) |
| Private               | False   |

Textual content

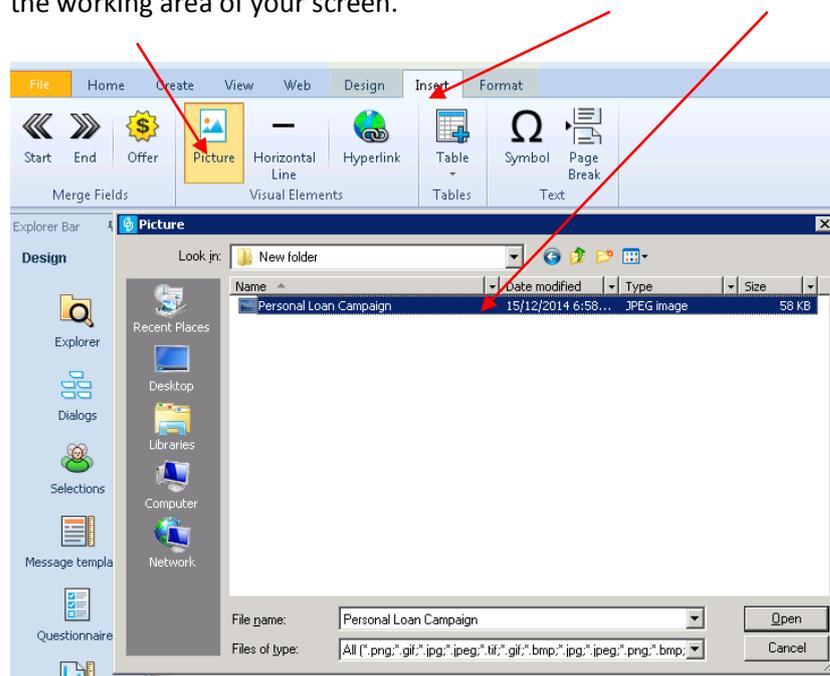
NB - There is no Control Parameters section in letter templates.

**EDITING TEXT:** You can use the 'Insert' and 'Format' tabs to insert elements into or format your template. You can also use the right-click popup menu to edit elements that are already in the template.

If you are starting with a blank template, simply type your text in the work area, or paste it from an external Word doc. With HTML emails you can also directly edit the HTML code via the HTML tab. *(For more information specific to HTML emails, please refer to the Quick-start guide for 'Creating and Editing a New EDM')*

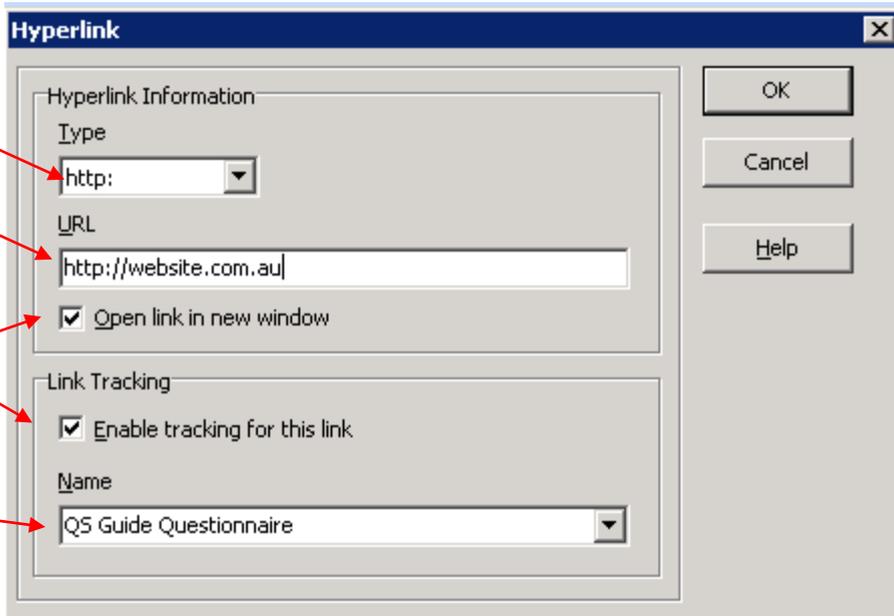
**INSERTING IMAGES:** You can insert images into Email and Letter templates only. Facebook templates do allow for images however you would input an image filename in the Control Parameters, as opposed to inserting it. Inserting images into an email template are a little more complex and covered in more detail in the Quick-start guide for 'Creating and Editing a New EDM'. **Below are instructions on how to insert an image into a Letter template.**

Go to the 'Insert' tab and select the 'Picture' button. In the window that pops up, find and select the image that you would like to insert, then click 'Open'. Your image should now be visible in the working area of your screen.



**HYPERLINKING TEXT & IMAGES:** Highlight the text or image 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:

- **Email Templates example**



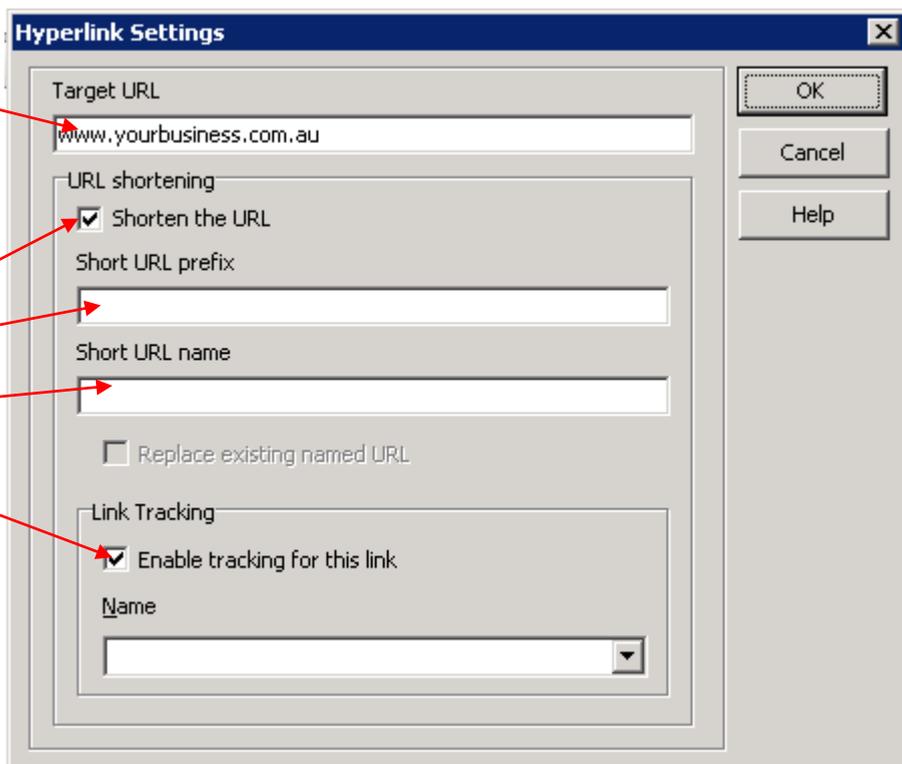
The screenshot shows the 'Hyperlink' dialog box with the following fields and options:

- Type:** A dropdown menu set to 'http:'.
- URL:** A text box containing 'http://website.com.au'.
- Open link in new window:** A checked checkbox.
- Link Tracking:** A section containing a checked checkbox for 'Enable tracking for this link'.
- Name:** A dropdown menu set to 'QS Guide Questionnaire'.

Annotations with red boxes and arrows point to the following elements:

- 'Leave as it' points to the 'Type' dropdown.
- 'Enter the URL you want to link to' points to the 'URL' text box.
- 'Check both of these boxes' points to the 'Open link in new window' and 'Enable tracking for this link' checkboxes.
- 'Select a name from the dropdown box or type in a new one' points to the 'Name' dropdown menu.

- **Facebook and SMS Templates example**



The screenshot shows the 'Hyperlink Settings' dialog box with the following fields and options:

- Target URL:** A text box containing 'www.yourbusiness.com.au'.
- URL shortening:** A section containing a checked checkbox for 'Shorten the URL', a text box for 'Short URL prefix', and another text box for 'Short URL name'.
- Replace existing named URL:** An unchecked checkbox.
- Link Tracking:** A section containing a checked checkbox for 'Enable tracking for this link'.
- Name:** A dropdown menu.

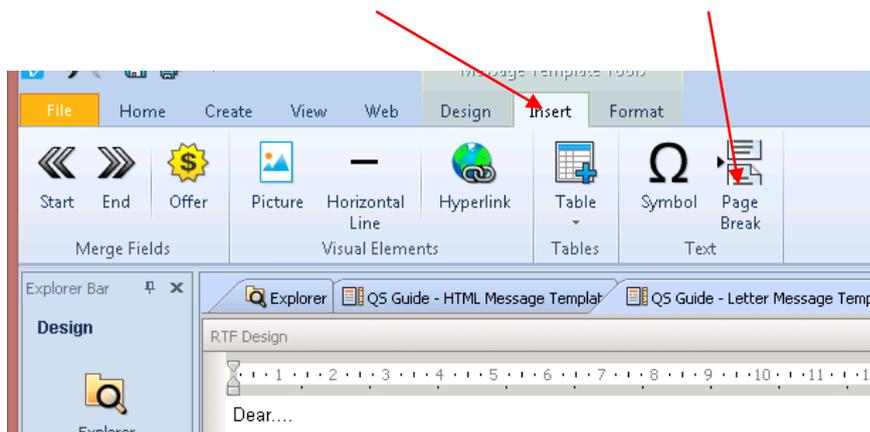
Annotations with red boxes and arrows point to the following elements:

- 'Enter the URL you want to link to' points to the 'Target URL' text box.
- 'If your URL is very long it is a good idea to take advantage of the URL shortening function. Enter these details in here and check the link tracking box.' points to the 'Shorten the URL' checkbox, the 'Short URL prefix' text box, the 'Short URL name' text box, and the 'Enable tracking for this link' checkbox.

- **Letter Templates example** (in case you are attaching a letter template to an email)



**INSERTING A PAGE BREAK (Letter Templates only):** Page breaks are used to ensure that each new customer record starts on a new page when it is printed. To insert one, click on the place you want your page break to be inserted – you can insert it at the bottom of your text once you are finished, or you can insert it first, and then make sure your text and other content remains above the page break line. Once in the right spot, click on the 'Page Break' button in the 'Insert' tab. A horizontal line with page fold appears in your document when finished.



**CONGRATULATIONS! You have now created and edited your first Message Template.**