REPORTING

ADD NEW TEMPLATE

The *Email Designer* tool gives users the ability to create email templates and provides a designer for customising existing emails within *BPO2*. Users also have the opportunity to test these email templates using *BPO2*'s existing email service.

USER REQUIREMENTS

- A basic working knowledge of **word processing software** e.g. Microsoft Word.
- An **email address**, used for sending out emails.
- An understanding of where the **email flags** occur in BPO.
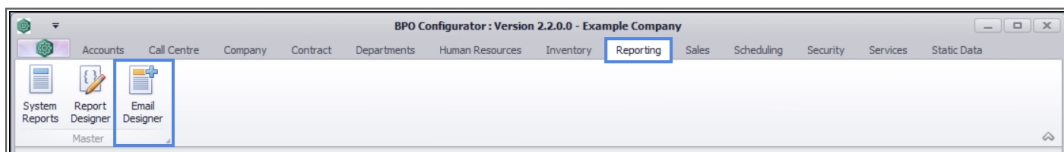
VERSION COMPATIBILITY

- BPO2 v2.4.0.1 or later.
- BPOConfigurator v2.2.0.0 or later.
- Ensure that users have run the latest upgrade script necessary, to use the new email designer module.
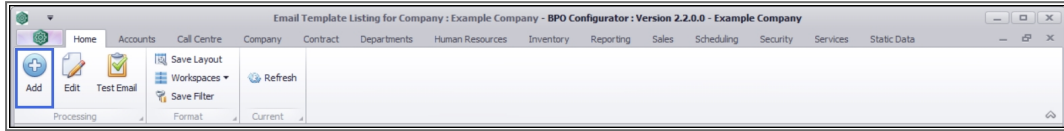

Ribbon Access: *Configurator > Reporting > Email Designer*

ADD A NEW TEMPLATE

- The **Add** button allows users to create a template for an <u>existing</u> company email flag.

1. The **Edit Email Template** screen will open with a <u>blank</u> template loaded.

Here, the user can:

2. Set the **layout**,
3. Type in the **Email Subject** line
4. Link an **Email Flag** to the template

It is important to note that the **Email Flag** should be selected before editing the document. Any edits made <u>before</u> the flag is selected will be overridden.

5. Click on the **Search** button in the **Email Flag** field.
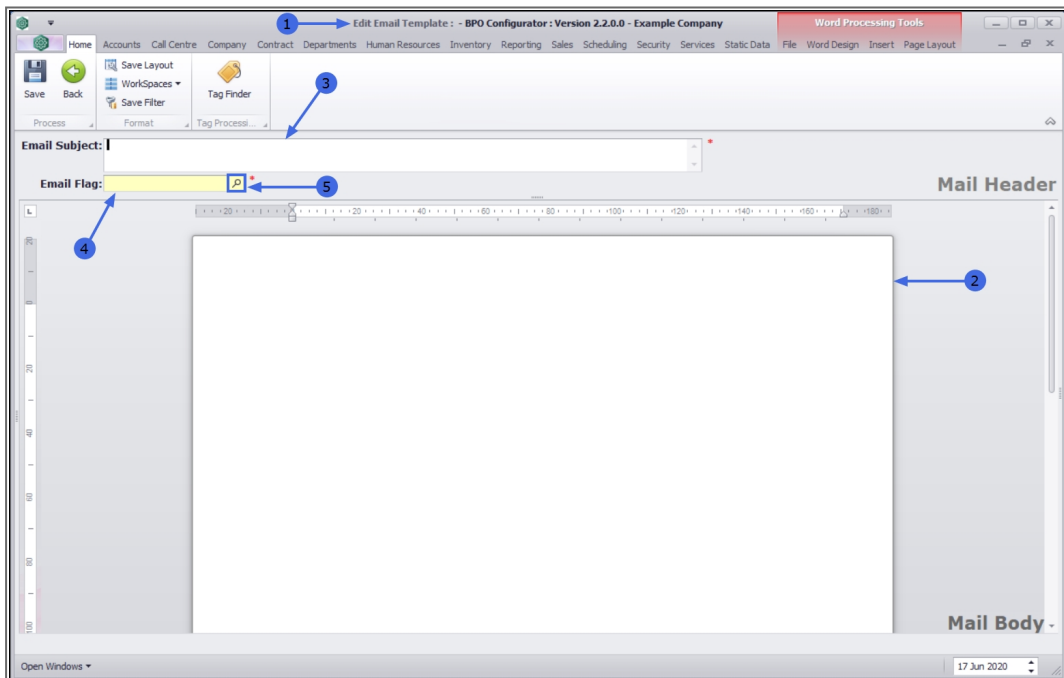
1. The *Please select an email flag* screen will pop up.
2. Select the particular flag that you wish to create a template for.
3. Select *Ok*.

   - **Note**: Only flags already set up in the system database will be displayed here. The system does <u>not</u> allow the user to create new email flags from the designer.
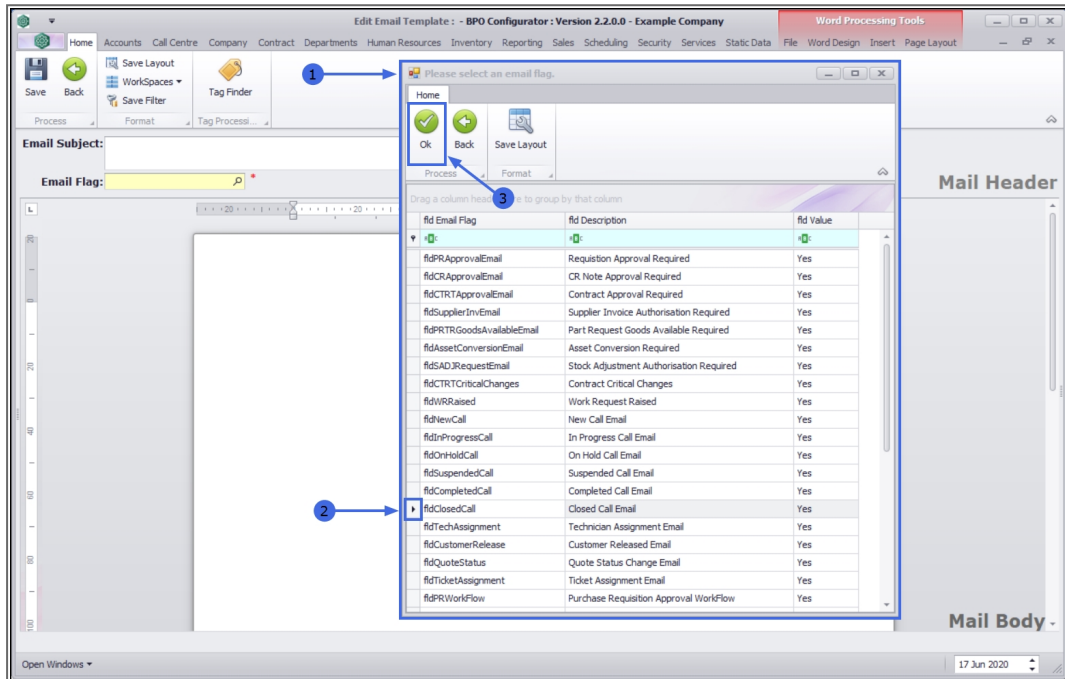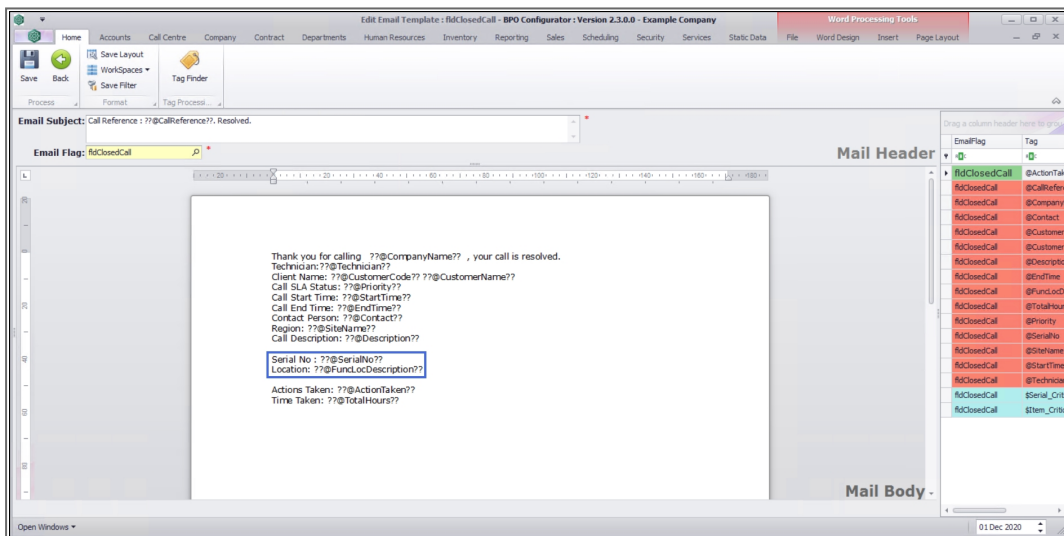

- Once the email flag is selected, the template and associated data is extracted from the database.
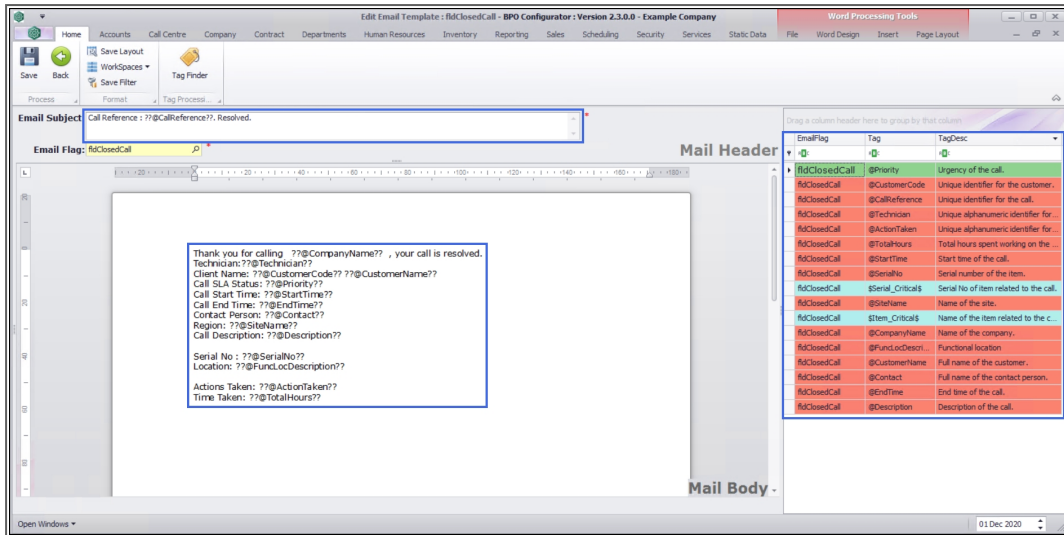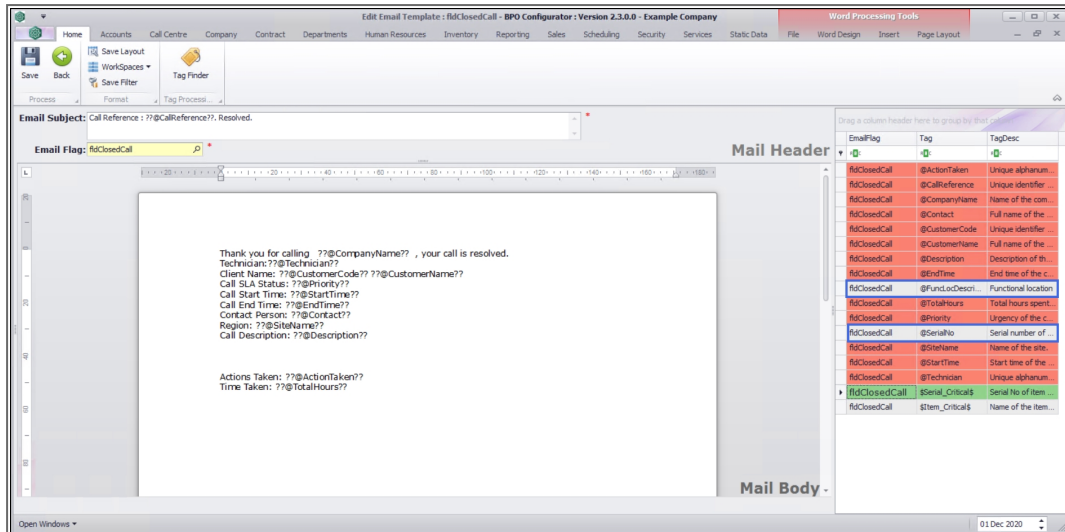
DELETING INFORMATION

- Select the text you wish to delete and use *Delete* or *Backspace* on the keyboard.
- In this example *Serial No* and *Location* will be deleted.

- If *tags* were part of the deleted information, the tags deleted from the template body will now have a different colour in the *Grid View*.
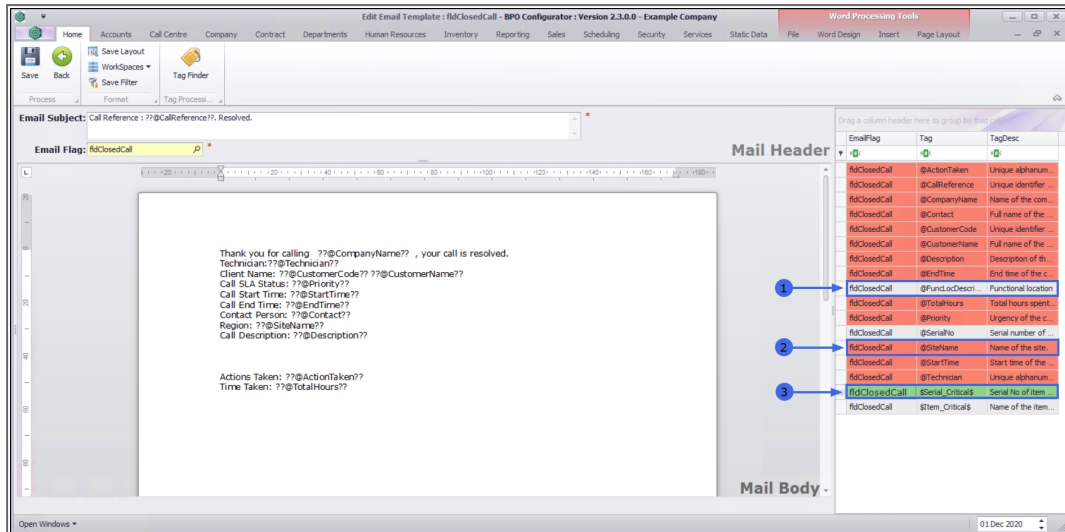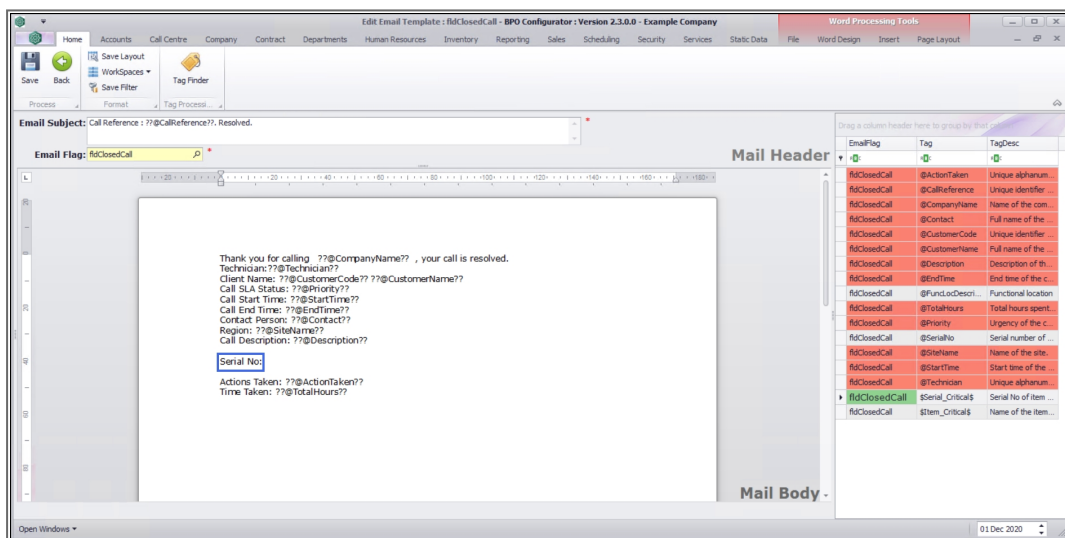
GRID VIEW

The *Grid View* shows all the fields that can be used by the email template. In this *Grid View*;

1. *Field tags* are red, *condition tags* are blue and *loop tags* are gold by default.
2. A tag that has been <u>removed</u> and where there are no other occurrences of this particular tag on the template, the row colour for this tag is updated to default grey.
3. The row colour of a <u>selected</u> row (where the row selector is) is green.

ADDING INFORMATION

- You can type in information you wish to add in the template body.
- In this example, text - *Serial No:* has been typed in.

- If you wish to add a tag to the email template, drag the tag you wish to add from the *Grid View* and drop it on the template.
- In this example, tag - *@SerialNo* has been dragged from the *Grid View* and dropped on the template.

- **Note 1**: If the tag was not in use, the row colour will change from grey to red.
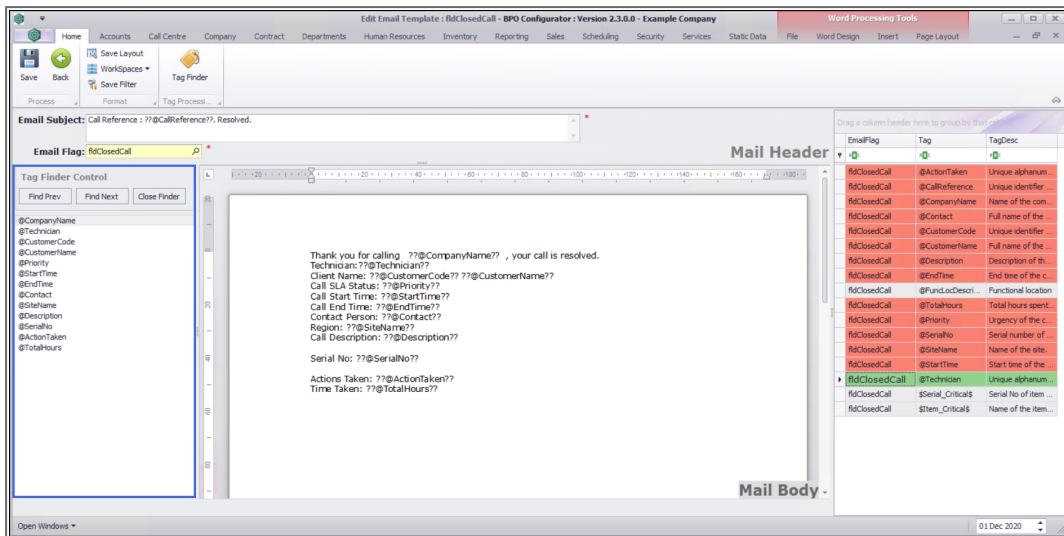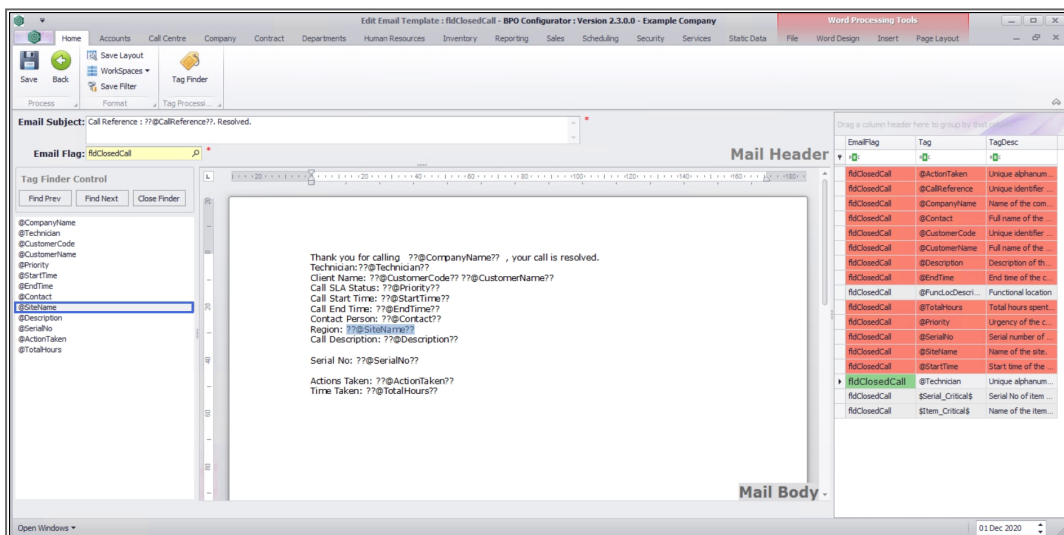- **Note 2**: A tag can be used <u>multiple</u> times on a template.
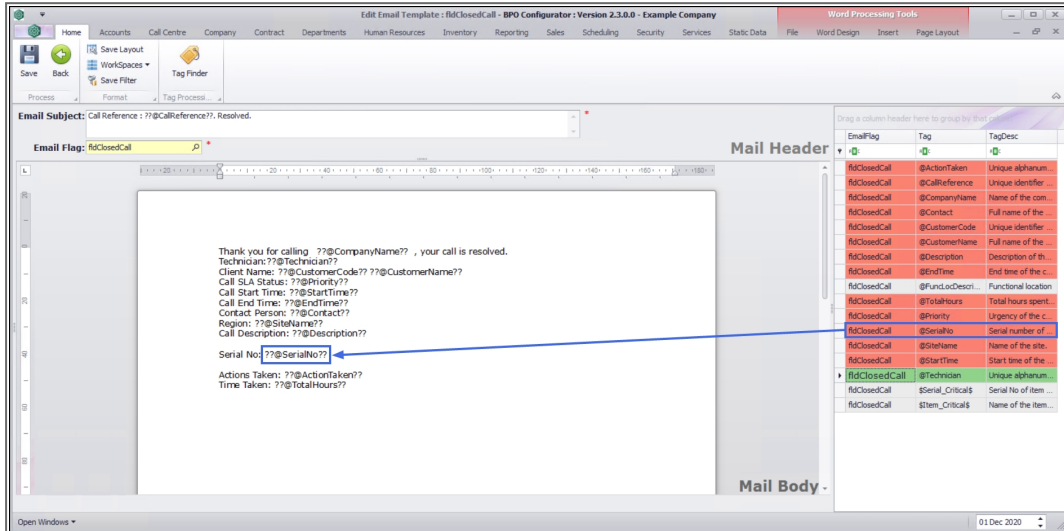
TAG FINDER

- The tag finder is used to quickly identify where tags are located on the template.
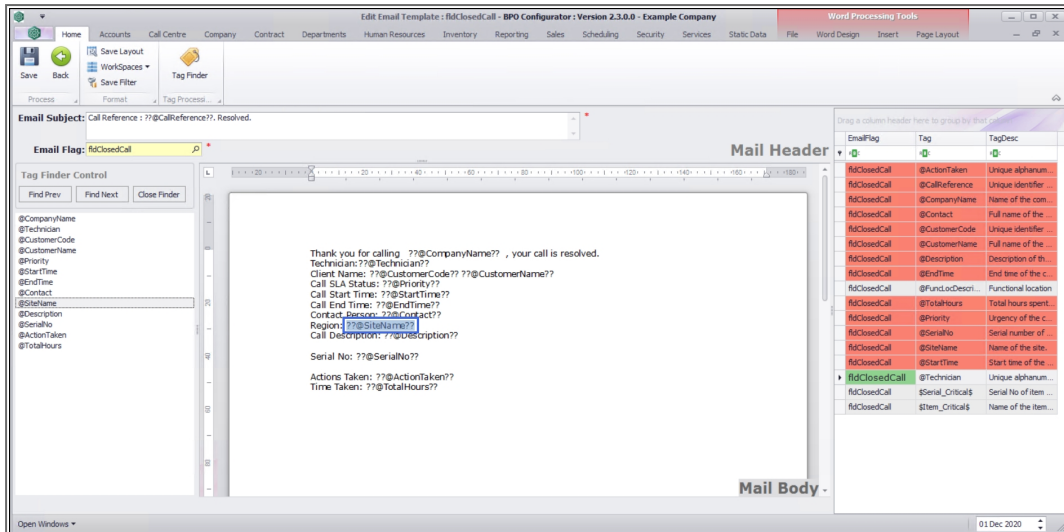- Click on *Tag Finder*.
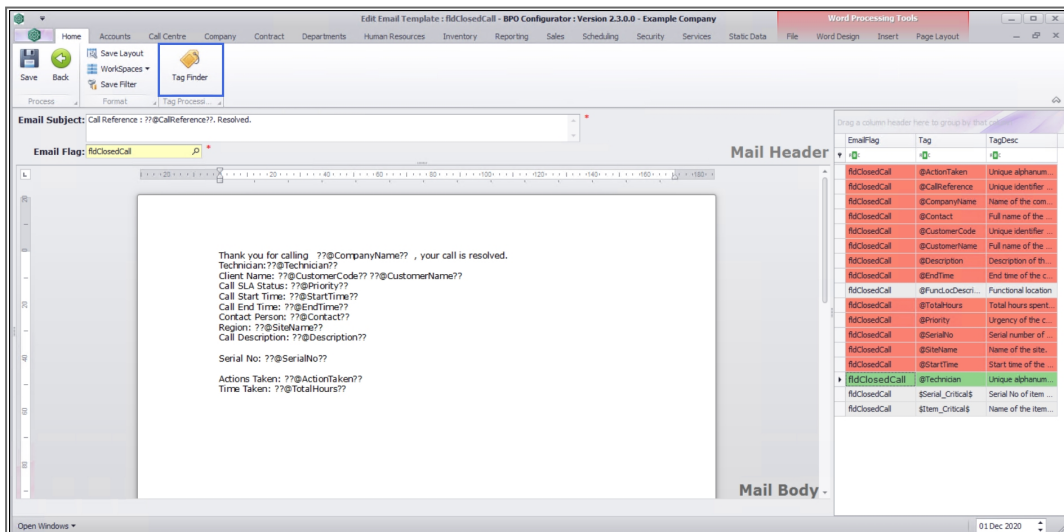
- The *Tag Finder Control* will be displayed.

- Double click on the tag you would like to find.
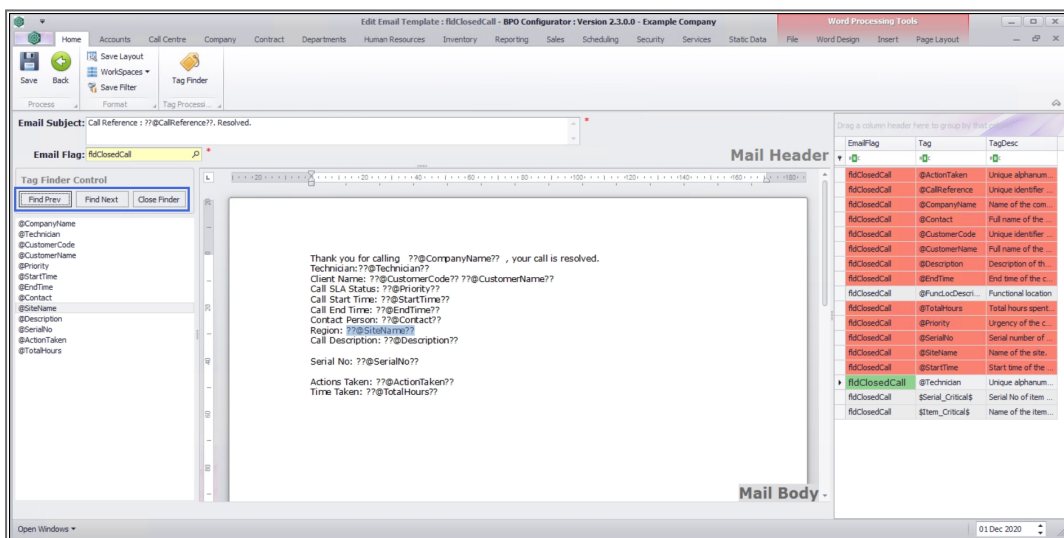- In this example, *@SiteName* has been selected.

- The selected tag will now be highlighted in the template.
    - Note: The tag finder is <u>not</u> able to highlight tags within the email subject line.

You can use the following Tag Finder Controls;

1. **Find Prev:** Finds the previous occurrence of a tag.
2. **Find Next:** Finds the next occurrence of a tag.
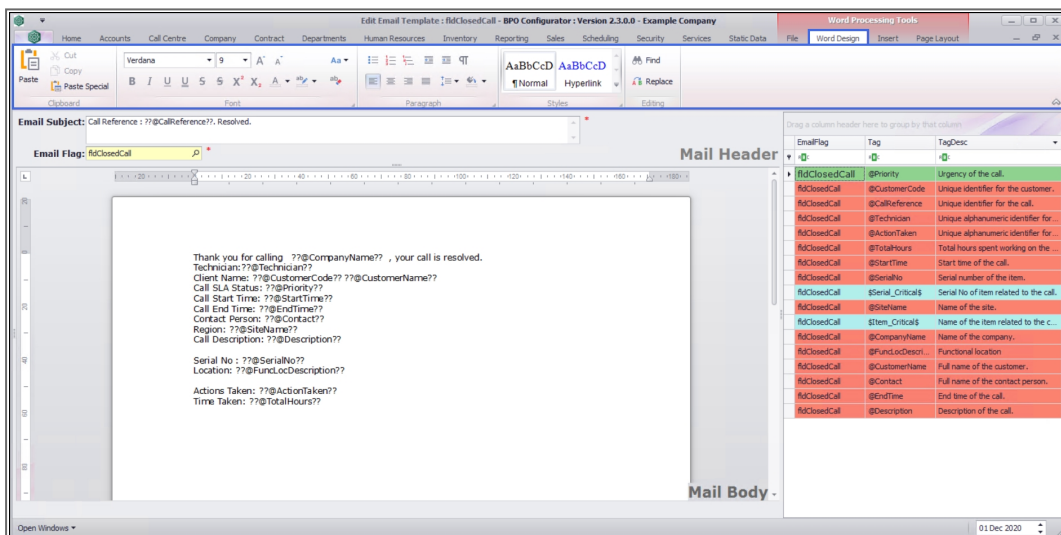3. **Close Finder:** Closes the tag finder.

WORD PROCESSING TOOLS

You can use the Word Processing Tools ribbon to edit the template. This ribbon contains the usual document editing tools such as picture inserts, table
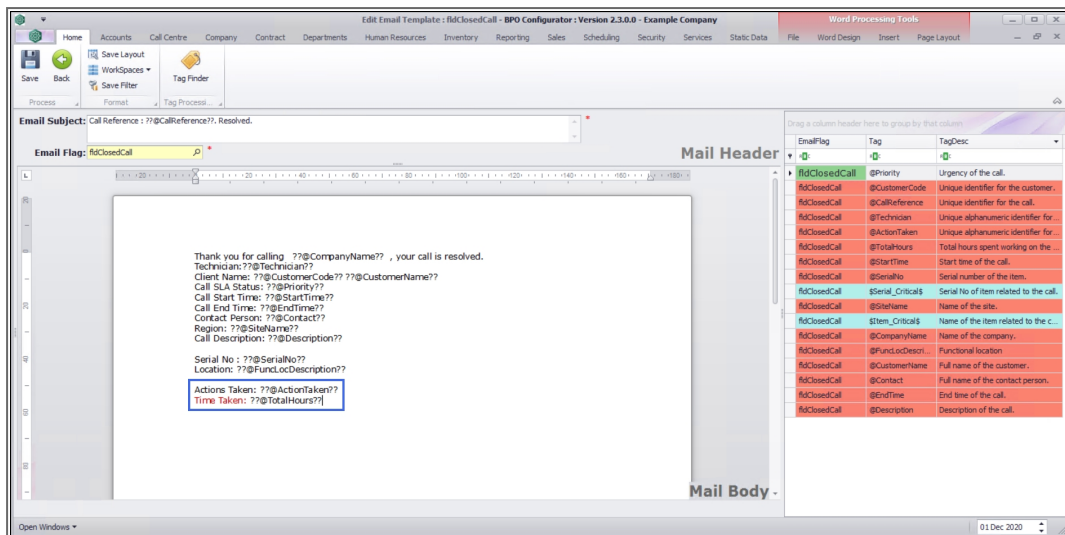
creation and word formatting.
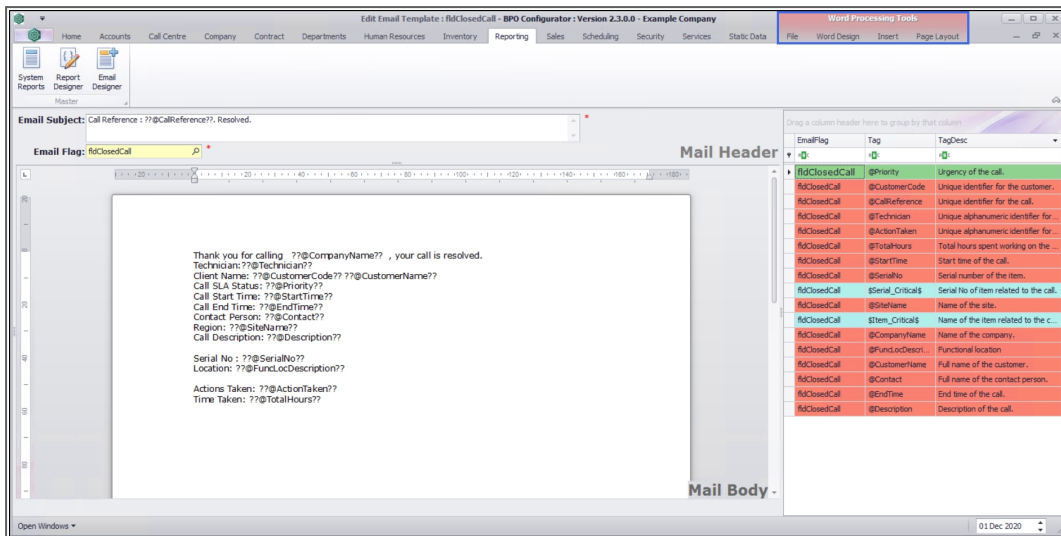
In this example , the *Word Design* tab has been selected and the options associated with it are now displayed in the ribbon.
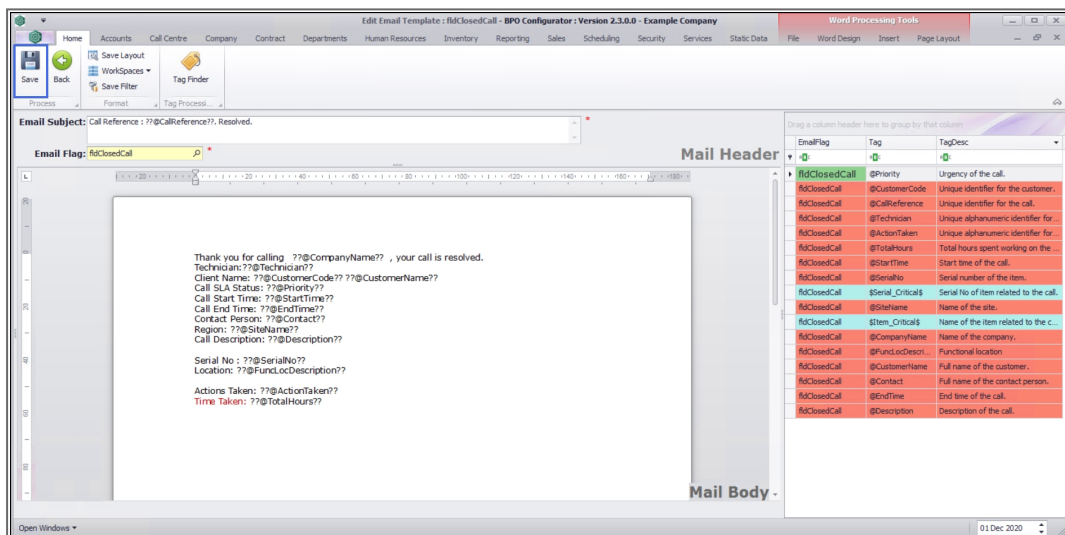

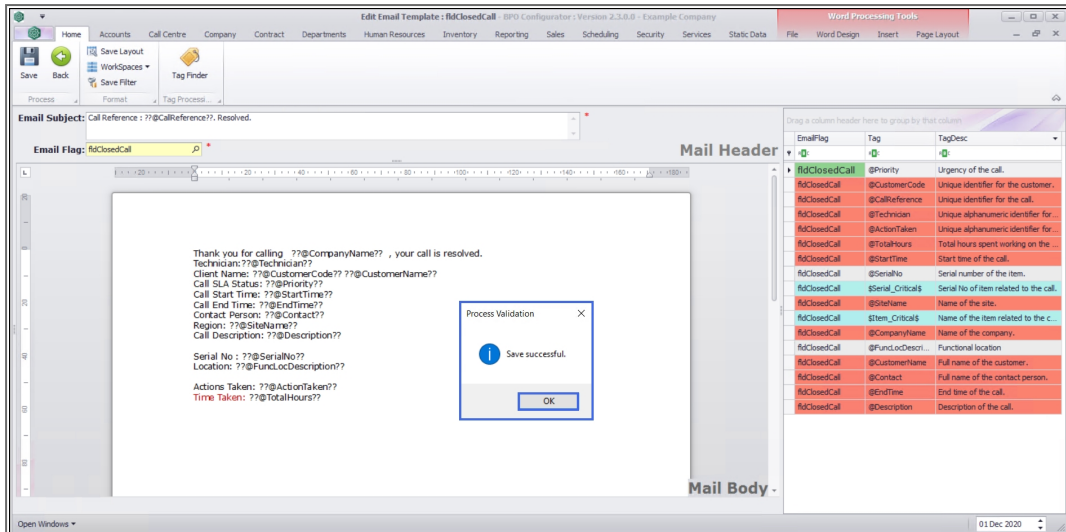In this example, the font colour for text - *Time Taken* has been changed to *red*.

SAVE EMAIL TEMPLATE

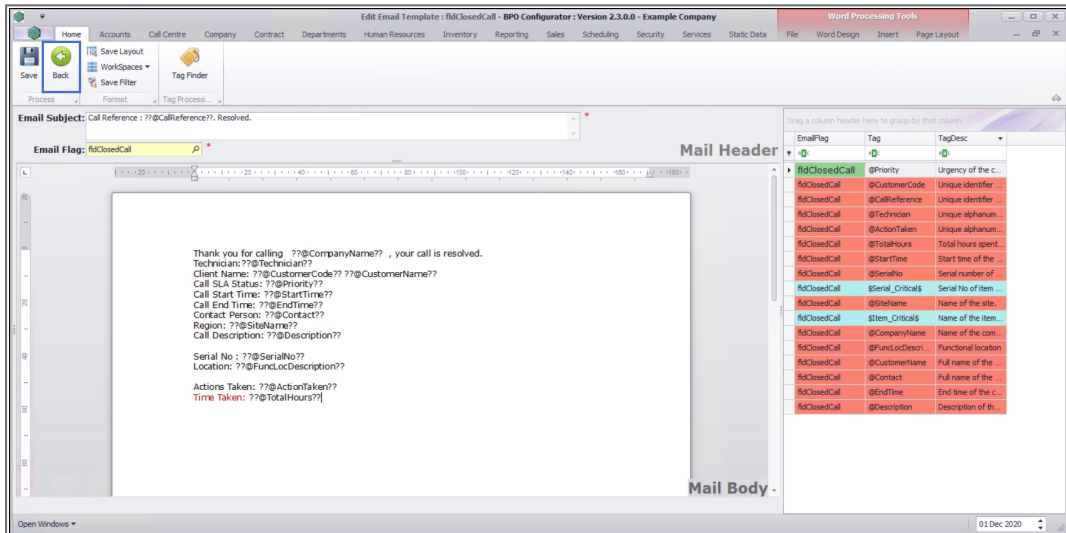- When you are done, click on *Save*.

- A *Process Validation* message will pop up telling you;
  - *Saved Successfully*.
- Click on *Ok*.

- Click on *Back* to return to the *Email Template Listing for Company: [ ]* screen.

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