Portrait
Dialogue

Web Portal User Guide

Version 6.1

Pitney Bowes
Software

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February 03, 2015

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Getting started

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About the Web Portal

The Web Portal is a web based application within Portrait Dialogue; a suite of software that supports Customer Relationship Management. It is used by marketers to define, manage and carry out structured communication processes with large numbers of customers, and is specifically designed to support the principles of one-to-one marketing.

The Web Portal application provides you with an intuitive environment for working with the different Portrait Dialogue modules available in the portal.

To start the Web Portal, see **Starting Web Portal**.

Starting the Web Portal

A user must be authorized in order to log on to the Web Portal.

The Web portal supports two login methods:

- **Normal login**

  When using Normal login, you have to manually type in your username and password. If successfully authorized, you are taken to the overview page.

- **Windows login**

  When using windows login, you do not have to type in your username and password. You are automatically authorized and logged in to Web Portal using your windows domain user.

  Note that the windows user must have login rights to Web Portal. If are not authorized, you are taken to the normal login page (see above).

The login types are set up by the system administrator.

If window login is enabled, and you are logged on your corporate windows domain, you will automatically be logged in to Web Portal. However, if you are not logged on your windows domain, or windows login is disabled, you will be taken to the login page when starting Web Portal. When starting Web Portal from Visual Dialogue, you will always be automatically logged on with the user you logged on to Visual Dialogue.

Advanced login

- **Instance**

  When logging on to the Web Portal, the system can be set up to give access to different instances. To access this option, click on the *Show Advanced* button in the lower right corner. The window will expand and a drop down box will show available instances. Select the wanted instance and continue logging in.

- **Remember my username**

Select this checkbox if you want the login page to remember your username the next time you open Web Portal login.

Navigating in the Web Portal

Web Portal is a web-based application that runs on Microsoft Internet Explorer and Mozilla Firefox.

Navigation

Do not use the web browser's back and forward buttons. Instead, use the Web Portal's built in navigation functionality:

- When two or more modules are available in the Web Portal, click the module's tab in order to open the module's start page.
- The different sections of a module is available on the sub menu below the top menu.
- Otherwise use the navigation functionality provided by the current module, such as the left menu.

Note: If you have Web Portal open, and at the same time open another web link, the new link can be opened in the same window as the Web Portal. To avoid this, change your settings in Windows Explorer or open a new explorer window before clicking on the new link.

Web Portal settings

Click the *Settings* link in the upper right corner to open the settings page.

The settings page contains global settings for the Web Portal, such as language. The page also contains settings for the currently active module.

- **Portal settings**
  - **Language**

    The language used in the web portal
  - **Format**

    The language specific formatting used in the web portal, such as dates and numbers

- **Module settings**

  Each module in the Web Portal has it's own settings. This is available below the portal settings.

Change the desired settings and click *Save settings* or *Cancel* to cancel any changes. This will close the settings page and open the previously active page.

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Message Designer

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About the Message Designer module

The Message Designer is used to create and edit templates for:

- Emails
- Facebook
- Letter
- Sms
- Twitter

Templates can optionally be based on master templates (see Master template documentation in the *Visaul Dialogue User Guide* for details). Master template can consist of style sheets (email messages) and one or more body text areas.

Templates overview

The Templates overview page lists all Message Designer templates in the system.

Template Type

Use the **Template Type** field to shortlist a specific type of template, for example, Email or Sms. All filtered results appear in the list.

Sorting and grouping

The list is default sorted by created date. In order to sort the list on any of the fields, simply click the field column header.

Click once again on the header in order to reverse the sort order.

The list can also be grouped by any of the fields, e.g. *Created by:* Drag and drop the header you want to group by to the list header field *"Drag a column to this area to group by it"*.

Deleting a template

To delete a template in the list, right click the template and click *Delete*. The action must be confirmed and is not reversible when completed.

Creating a new template

To create a new template, click one of:

- New Email Template
- New Facebook Template
- New Letter Template

- New Sms Template
- New Twitter Template

This will open the *Create New Template* dialog. See **Creating new templates** for details.

Filtering the list

The list can be filtered by dragging column headings to the area immediately above and to the left of the *Search* field. This will filter the list by Name, Domain, Created by or Changed By. Alternatively, you can enter search criteria in the **Search** field and the list will update or filter automatically.

Creating new templates

In order to create a new email template, click one of the new template options on the side menu, for example, **New Email Template** or **New Facebook Template**. The **Create New Template** dialog appears.

This dialog contains three steps/fields that are required:

1. Enter the new email template's name
2. Select the customer domain. This will display all master templates for the selected domain
3. Select the master template on which to base the template. For details regarding master templates, see the Master Template section in the Visual Dialogue help.

Click the *OK* button to create the template; This will open the appropriate edit window corresponding to the template type chosen. For more information on editing a template, see **Editing email templates**.

Editing templates

In order to edit a template, open **Email templates overview** and click on the template to edit. This will open the **Template Editor**.

The **Template Editor** contains the following sections:

- **Control parameters**

  These fields are the most common template control parameters. Click on the icon to the right of the text boxes in order to insert a merge field.

- **Text or Body page editor**

  This is the design area where you add, edit and remove items from the template. If you are editing an email template you will see multiple body text areas. If you are editing any other template type, you will see a text editor.

- **Left menu**

  The left menu contains basic template information, template specific actions, testing and spam rating links and master template actions.

Editing Email templates

Item menu

Each body area and each item in the template has an item menu.

If a body area is empty, the Item menu will just contain an *Add* button.

The following actions are available on the Item menu:

- **Edit item**

  Click this button to edit the item. See **Editing items** for details.

- **Copy/Paste/Clipboard (sub menu drop down)**

  - **Copy below**

    Click this button to copy the item and paste it below the item

  - **Cut to clipboard**

    Click this button to cut the item and place it on the clipboard. See **Working with the item clipboard** for details.

  - **Copy to clipboard**

    Click this button to copy the item and place it on the clipboard. See **Working with the item clipboard** for details.

  - **Paste from clipboard**

    Click this button to paste the last added item from the clipboard. See **Working with the item clipboard** for details.

- **Delete item**

  Click this button to delete the item

- **Change style set (sub menu drop down)**

  Click this button to set/change the style set for the item. See **Style sets** for details.

- **Add static item (sub menu drop down)**

  Click this button to add a static item below the item

- **Add item below**

  Click this button to add a new item below the item. This will open the item *Add new item* dialog. See **Adding new items** for details.

- **Add item above**

Click this button to add a new item above the item. This will open the item *Add new item* dialog. See **Adding new items** for details.

- **Move down** 

  Click this button to move the item down (swap with the item below in the body area)

- **Move up** 

  Click this button to move the item up (swap with the item above in the body area)

Adding new items

Adding an item to an empty body area

When a body area is empty, the menu will only contain one button: **Add**.

Click the **Add** button to add a new item to the empty body area.

Adding an item below an existing item

In order to add a new item below an existing item, click the *Add below* button on the existing item's **Item** menu.

Adding an item above an existing item

To add an item above an existing item, click the **Add above** button on the existing item's **Item** menu.

Performing any of these steps will open the **Add new item** dialog. Browse and select the item type to add and click **Ok**.

Selecting **Open item edit dialog** will open the newly added item's edit dialog immediately after adding the new item. See **Editing items** for details on editing different item types.

Each item type has its own item edit control.

Editing items

Editing items

In order to edit an email template, click the the relevant body text area and click on the **Edit item** button () on the **Item menu**.

This will open the **Edit item** dialog. This dialog will contain one edit section for each part of the item.

General item properties

All items have a set of general properties. These properties can be found at the bottom of the item edit dialog.

- **Content alignment**

  Content alignment aligns the content of the item. Possible values are:

  - **NotSet:** Alignment is not set on the item. This will normally equals Left
  - **Right:** Aligns to the right edge
  - **Center:** Aligns to the center
  - **Left:** Aligns to the left edge
  - **Justify:** Aligns to the left and right edge

- **Item condition**

  Using *Item condition*, it is possible to define a customer related condition for the item. This statement is executed at merge-time, deciding if the item is included in the merged email.

  See **Item conditions** for details.

Item type specific properties

Each item type has it's own item edit control.

For editing *text* items, see **Text items** for details.

For editing *image* items, see **Image items** for details.

For editing *content object* items, see **Content object items** for details.

For editing *table* items, see **Table items** for details.

For editing *mixed* items, see **Mixed items** for details.

For editing *container* items, see **Container items** for details.

Text items

When editing a text item type, the edit dialog will contain one text editor control for each text item part.

The text editor has the following toolbar actions:

Undo

Undoes the last action

Redo

Redoes/Repeats the last action, which has been undone

Cut

Cuts the selected content and copies it to the clipboard

Copy

Copies the selected content to the clipboard

Paste plain text

Pastes plain text (no formatting) into the editor

Paste from word

Pastes content copied from Word and removes the web-unfriendly tags

Paste

Pastes the copied content from the clipboard into the editor

Font size

Allows the user to apply to the current selection font size measured in pixels (px)

Bold

Applies bold formatting to selected text

Italic

Applies italic formatting to selected text

Underline

Applies underline formatting to selected text

Foreground color

Text Color (foreground) button - Changes the foreground color of the selected text. The colors available are dependent on settings in the master template.

Background color

Text Color (background) button - Changes the background color of the selected text. The colors available are dependent on settings in the master template.

Bullet list

Creates a bulleted list from the selection

Number list

Creates a numbered list from the selection

Indent

Indents paragraphs to the right

Outdent

Indents paragraphs to the left

Link properties

Makes the selected text a hyperlink and/or opens the *Link properties* dialog

Remove link

Removes the hyperlink from the selected text

Insert merge field

Opens the *Merge field* dialog. Selecting or double clicking a field in this dialog will insert (paste) the merge field into the text at the cursor's position

Insert merge field start tag

Inserts (pastes) a merge field start tag (<<) into the text at the cursor's position

Insert merge field end tag

Inserts (pastes) a merge field end tag (>>) into the text at the cursor's position

Toggle full screen mode

Switches the text editor into Full Screen Mode

Image items

When editing an image item type, the edit dialog will contain one image editor control for each image item part.

The image edit control has the following settings:

- **Published file**

  Use this when you want to insert a published file (in this case a picture) that is stored by the Dialog Server.

  - **Select button:** Use this button to display the Select Image dialog box. Here you can browse all applicable published files on the Dialog Server.

- **Image location**

  Use this when you want to display an image already available on a web server. Enter the URL to the image in the Picture Source field. Example: *http://www.mycompany.com/MHProdWeb/Images/MHlogo_nordma.gif* . NB: Make sure you don't unintentionally specify a local file.

- **Tooltip/alternative text**

  Sets a text alternative and for the image

- **Size**

  Sets the size of the image. Toggling the chain between the two text boxes locks or unlocks the aspect ratio for the image size.

  Click the *Reset size* button in order to reset the image's size to it's original size.

  Note: The maximum image size may be limited by settings in the master template.

- **Embed image**

  This setting is only valid when referring a published file.

  Checking this option will embed the published file as an attachment in the email (else the published file will be referred by an url).

- **Enable image link**

  Check this option to enable the image as an hyper link.

  - **Image link url**

    The url address or Web Link of the image link, when enabling the image as an link

- **Open link in new window**

  Opens the image link in a new window. This settings is recommended on when enabling the image as an link

- **Enable link tracking**

Check this option to enable link tracking for the image link

- **Link name**

  The name of the tracked link. This will be automatically populated when enabling link tracking

Content object items

When editing a content object item type, the edit dialog will contain one content object editor control for each content object item part.

The content object edit control has the following setting:

- **Select content object**

  Use this drop down list to select the content object to use

Table items

When editing a table item type, the edit dialog will contain one table edit control for each table item part.

Adding a new row to the table

Click *Add new row* in order to add a new row to the table.

This will insert an empty row at the bottom of the table.

Adding a new column to the table

Click *Add new column* in order to add a new column to the table.

This will insert an empty column at the end of the table.

Editing the content of the cells in the table

Click a cell to edit it's content. The cell content is edited using the text editor below the table.

The cell is continuously updated when working in the text editor.

This text editor is the same editor used when editing text items. Thus see **Text items** for details on using this text editor.

Deleting rows and columns

In order to delete a row or a column, click the delete button in the row's or column's header cell.

Mixed items

Items of type Mixed can contain parts of one or multiple different item types.

When editing a mixed item type, the edit dialog will contain one item type specific editor control for each different item part.

For editing *text* item parts, see **Text items** for details.

For editing *image* item parts, see **Image items** for details.

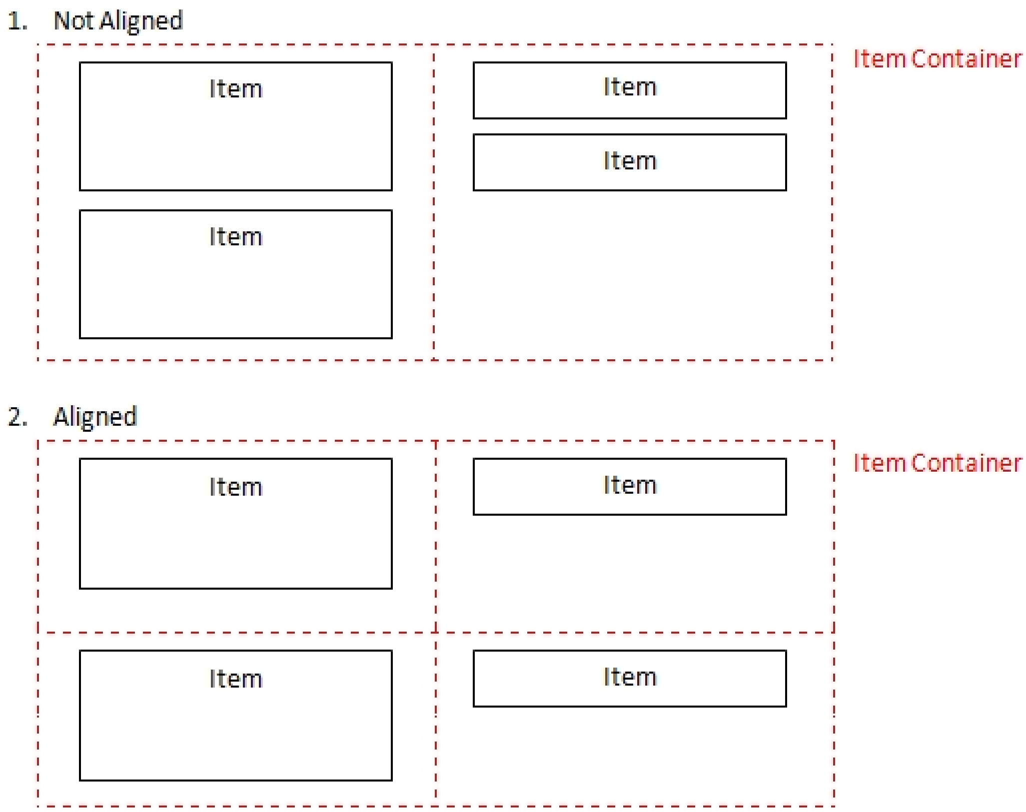
For editing *content* object item parts, see **Content object items** for details.

For editing *table* item parts, see **Table items** for details.

Container items

A *container item* is a special item for organizing multiple child items in a tabular fashion.

The items are organized in columns and may be horizontally aligned:



Container item properties

The container item edit control has the following settings:

- **Align items horizontally**

  This setting will horizontally align items in the different columns in the container

- **Span static items cross all columns**

  This setting will span static items cross all columns in the container

- **Column width**

Optional.

These text boxes sets the width of the columns.

When setting the column's widths, and the container has an width of 100% (standard), it is recommended that one of the column's width is left blank in order for the column to dynamically resize itself to the remaining container width.

Clicking the *Click here to automatically set width on all columns* link will thus set width on all columns except the last.

- **Column spacing**

  Optional.

  Use this setting to add a spacer column between all columns in the container.

Images in containers

If the *Body Area's* maximum image width is set, images (item type image) are scaled down to this width (if they are wider than this width).

If adding an item type image to a container, similar logic will be applied to the image: If the column width is set for the containing container column and the image is wider than this value, the image is scaled down to this width.

Working with the item clipboard

The item clipboard provides functionality for cutting or copying items to a clipboard and pasting a copy of this item anywhere in the template (or other templates).

The clipboard's scope is within your user session, thus the clipboard will be reset when logging on the application.

Cut and copy to the clipboard

On an item's menu, click the *Copy/Paste/Clipboard* button (). This will open a drop down menu - this menu provides the following clipboard related actions:

- **Cut to clipboard**

  Click this button to cut the item and place it on the clipboard.

- **Copy to clipboard**

  Click this button to make a copy of the item and place it on the clipboard.

Paste from the clipboard

There are two ways to paste an item from the clipboard:

- **Paste the last added item from the clipboard**

  On the *Copy/Paste/Clipboard* menu, click Paste from clipboard - this will paste the last added item from the clipboard.

- **Paste items from clipboard**
  1. Open the *Add new item* dialog.
  2. Open the *Clipboard* tab. This open the *Item clipboard*.
  3. Double-click the item you want to paste.

Deleting items from the clipboard

In order to delete one or many items from the item clipboard, follow these steps:

1. Open the *Item clipboard* (as described in the previous section).
2. On the item to delete, click the delete button in the upper right corner

   or

   Click the *Clear clipboard* button to remove all items from the clipboard.

Style sets

Style sets are used for applying different styles to items in your template.

Style sets are configured in the Master template. See the master templates documentation for details.

Applying style sets

In order to apply a style set on an item, follow these steps:

1. On the item menu, click the *Change style set* button (). This will list all applicable style sets for the item.
2. Click the style set to apply.

Resetting an item's style set

In order to reset an item's style set, follow these steps:

1. On the item menu, click the *Change style set* button ().
2. Click the *Default style set*.

Item conditions

It is possible to define an item condition for any of the items in a template.

Using *Item condition*, it is possible to define a conditional statement for the item. This statement is executed at merge-time, deciding if the item is included in the merged email.

Defining an item condition

In order to define an item condition, click the *Edit condition* at the bottom of the Item edit dialog.

This will open the *Item Condition* dialog.

The item condition can be defined either using a selection or an expression.

Defining an item condition using a selection

The selections available in this dialog are defined in Visual Dialogue. See *About Selections* in the Visual Dialogue documentation for details on creating selections.

Follow these steps to define an item condition using a selection:

1. Check the *Customer* is in selection radio button
2. Select a *Selection* from the drop down list

   The item will be included if the customer is in the specified selection.

   If checking the *Is not in selection*, the item will be included if the customer is <u>not</u> in the specified selection.

Defining an item condition using an expression

Follow these steps to define an item condition using an expression

1. Check the *Expression* radio button
2. Write a expression in the text box.

   The item will be included if the customer is in the expression's result set.

   Click the *Test expression* button at the right of the text box to test the expression's syntax

Changing master templates

It is possible to change the master template that email template's are based on to other master templates in the same customer domain.

Changing the master template will change all non-content data in the email template; This includes the new master template's HTML code and style sheets, and all Item definitions' HTML code.

If the item restrictions (in the new master template's body areas) is further constricted, items may be removed when changing the master template.

Reapplying master templates

It is possible to reapply the master template that template's are based on.

Reapplying the master template will refresh all non-content data in the template; This includes the master template's HTML code and style sheets, and all Item definitions' HTML code.

If the item restrictions (in the master template's body areas) is further constricted, items may be removed when reapplying the master template.

Tracking overview

Email tracking

You can track when an HTML email sent by the system is opened by the customer. This is called email tracking. To enable tracking of an email, check the *Enable email tracking* in the *Tracking Overview* dialog.

This will insert a tracking image at the end of the email. This image will under most circumstances be invisible for the end user. When the customer opens the email, the image will be downloaded and the event is logged by the system.

Note that some email clients (for instance Microsoft Outlook) don't display images by default, but require the user to manually accept showing them. This prevents email tracking from being 100% accurate.

Link tracking

The tracking overview contains a combined list of all links in all text items, table items and image items.

You can enable or disable link tracking on individual links by checking the checkbox beside each link, or you can enable or disable all links by clicking the *Toggle track all links* button.

You can edit the link tracking name using the text box to the right of the check box.

Link tracking usage

Link tracking reports are available in the message browser and the dialog designer.

Email tracking usage

Email tracking reports are available in the message browser and the dialog designer. You can also use email tracking in you selections.

Editing Facebook, SMS, Letter, and Twitter templates

In order to edit a template, double-click a Facebook, Twitter, Sms, and Letter template on the **Templates Overview** screen. This will open the **Template Editor** screen along with the **Text Editor**.

The **Template Editor** contains the following sections:

- **Control parameters**

  These fields are the most common template control parameters. Click on the icon to the right of the text boxes in order to insert a merge field.

- **Text or Body page editor**

  This is the design area where you add, edit and remove items from the template. If you are editing an email template you will see multiple body text areas. If you are editing any other template type, you will see a text editor.

- **Left menu**

  The left menu contains basic template information, template specific actions, testing and spam rating links and master template actions.

Working with the Text Editor

In order to edit a template using the **Text Editor**, double-click a Facebook, Sms, Letter, or Twitter template in the **Templates Overview** screen. This will open the **Template Editor** along with the **Text Editor**.

The **Text Editor** provides the following text editing options:

Undo

Undoes the last action

Redo

Redoes/Repeats the last action, which has been undone

Cut

Cuts the selected content and copies it to the clipboard

Copy

Copies the selected content to the clipboard

Paste

Pastes the copied content from the clipboard into the editor

Insert merge field

Opens the *Merge field* dialog. Selecting or double clicking a field in this dialog will insert (paste) the merge field into the text at the cursor's position

Insert merge field start tag

Inserts (pastes) a merge field start tag (<<) into the text at the cursor's position

Insert merge field end tag

Inserts (pastes) a merge field end tag (>>) into the text at the cursor's position

Insert a hyperlink

Allows you to insert a hyperlink

Toggle full screen mode

Switches the text editor into Full Screen Mode

Testing and spam rating

Test options

The Test Options dialog allows you to specify the set of customers you want to use when test merging the template.

- **Specify a set of customers**

Use this setting to specify a set of customers to use when test merging the template

Selection: The selection used to select the set of customers. Setting this to *<Not selected>* will return the first found customers in the database.

Max number of customer: The maximum number of customers returned when test merging. This must be an integer value between 1 and 20

Expression: An optional expression used to filter the customers returned by the selection

- **Specify a single customer**

  Use this setting to specify a single customer (using the customer ID) to use when test merging the template

Testing a template

The *Test template* window allows you to test merge a template and preview the result in your browser.

The template is merged using a set of customers into a set of messages. See **Test options** on how to select these customers.

- **Browsing the merged messages**

  Use the *First, Previous, Next* and *Last* buttons to preview the test merged messages.

- **Test sending a message**

  Click the *Test send* button (envelope icon) to test send the message to an email recipient.

  See **Test sending a template** for details.

- **Spam rating a message**

  Click the *Spam rate* button (red flag icon) to spam rate the message. This will open the *Spamrating report* window.

  See **Spam rating a template** for details.

- **Printing a test message**

  Click the *Print message* button (printer icon) to print the message. This will normally open your system's *Print* dialog.

- **Disabling images - Email messages only**

  Click the *Disable images* button to disable all images used in the email. This will disable all html images (html IMG tags) and all background images referred in CSS.

  The purpose of this is to preview a message as it will be displayed in an email viewer (e.g. outlook) which disables images in HTML emails by default.

Test sending a template

When designing a message in the Template Designer, it is possible to test send the message.

This functionality makes it easy to test the message and see how it looks when received by the client.

A message can be test sent by following these three steps:

1. **Test merge the message:** Open the **Test message** window
2. **Open the *Send test message* dialog:** Click the *Test send* button (envelope icon)
3. **Send the message:** Enter the key control parameter for example, cellular number for an Sms, or email address for an email message and click **OK**.

Spam rating a template (Email only)

Mass communication by email is an important part of Portrait Dialogue. One problem when sending emails is the possibility of the mail being filtered in a spam filer. To help our customers avoid this we want to give them an opportunity to test the messages they are composing to see how likely it is they will be marked as spam.

Spam rating a template

In order to spam rate an email template, open the *Spamrating report* window.

This will test merge the email and produce a spam rating report for the resulting message. The spam score indicates the likelihood that the email will pass spam filters.

Control parameters

Control parameters are used to control the delivery of your message.

You can use merge fields in the control parameters. You can for instance use an email address merge field in the control parameter *To address* in templates to merge the customer's email address into the message.

Control parameters for email messages

The following control parameters are available in the list. Most of these control parameters are values defined by the standard email protocols. However, some are proprietary and control the content of the email, or how the email is sent.

Parameter	Description
Subject	The subject of the email.
To address	The email address of the receiver of the email. Normally, this will be set to the email address of the customer.
From address	The email address from which the email is sent.
CC address	Indicates carbon copy recipients for the message. In other words a list of email addresses that will receive a copy of the email.
BCC address	Indicates blind carbon copy recipients for the message.
Reply address	The address that the recipient will send to, if he or she replies to the email. This value only needs to be specified if it is different from the *From address*.

Parameter	Description
Attachments	A semicolon separated list of additional files to attach to the email message. Local paths, as seen from the Dialog Server, must be specified.
Validate target address	Specifies if the email address should be validated before trying to send the email. Default value is *True*.
Priority	The email priority as it appear to the recipient. This parameter does not control the priority when the email is sent. Default value is *Normal*.
Content transfer encoding	Specifies the MIME encoding for the message during message transmission.
CharSet	Indicates the character set used for the message.
Organization	Identifies the organizational affiliation for the message author.
Receipt recipient	Return receipt email address.
Insert identifier in header	Controls whether a specific identifier is inserted in the email header. This identifier is used by the system to identify bounced emails.
Add plain text part	Specifies whether a plain text part is added to an HTML email. The plain text part should be specified in the parameter *Plain text part*. Default value is *False*.
Plain text part	The plain text part added to en HTML email if the *Add plain text part* parameter is set to *True*. *Example:* This is a mail message in HTML format. Please enter the url below in your web browser to read it:||<<mh_message_url>> In the example, the tag *mh_message_url* will be converted to a link to a web page showing the HTML version of the email. || is used to insert a line break.

Control parameters for Facebook messages

The following control parameters are used with Facebook message types.

Parameter	Description
Facebook username and **Facebook access token**	Facebook sequrity keys. Your customer data should contain these keys and they have probably been gathered by using a Facebook Application that requested access to a Customers Facebook account.
Location	You can provide location information by specifying the Facebook Page ID that is linked with the required location. See Facebook for more information on locations.
Private	The Wall status can be made private by specifying *True* for the **Private** parameter.
Image filename	Used when uploading an image to Facebook, provide an image filename. A local path, as seen from the Dialogue Server, must be specified. The currently

Parameter	Description
	supported image formats are JPG, GIF, BMP, TIF and PNG. Please refer to Facebook for more information on the currently supported image sizes.
Image URL	If available, a link to the picture included with this post.
Link URL	The link attached to this post.
Link name	The name of the link.
Link description	The caption of the link (appears beneath the link name).

Note: The control parameters for Facebook messages will differ depending on what type of Facebook message you are creating. Please see Facebook documentation for Facebook security details.

Control parameters for Twitter messages

The following control parameters are used with Twitter message types.

Parameter	Description
Access token, **Access token Secret**, **Consumer Key**and **Consumer Secret**	Your data should contain these keys and they have probably been gathered by using a Twitter Application that requested access to a Customers Twitter account.
Send to screen name	Used to identify the Twitter user that the direct message will be sent to. An example is @PortraitTweet. These users need to be followers of the account being used to send the Direct Message from.
Attached image path	Used when uploading an image to Twitter, provide an image filename. A local path, as seen from the Dialogue Server, must be specified.

Note: The control parameters for Twitter messages will differ depending on what type of Twitter message you are creating. Please see Twitter documentation for Twitter security details.

Template properties

The *Properties* window can be opened from the left menu. The window contains two tabs: the General tab and the Advanced tab.

The General tab

This tab shows the following information:

- **Name**

The name of the template

- **Customer domain**

  The customer domain the template gets its customers from

- **Document type**

  The document type of the template

- **Master template**

  The name of the master template the email template is based on

- **Created by**

  The login name of the user who created the template

- **Created date**

  The date and time the template was created

- **Last modified by**

  The login name of the user who last modified the template

- **Last modified**

  The date and time the template was last modified

The Advanced tab

This tab enables you to control the following:

- **Generate activity**

  If you want activities to be created when messages based on the template are sent, choose an activity type here. One activity will be created for each message.

- **Activity description**

  If you chose to generate an activity when sending messages, you can enter the activity description here

- **Priority**

  This is the system priority used when the message is sent. Set priority to above normal when it is important that the customer receives the message relatively quickly. An example may be an email that contains a "forgotten password".

- **Use outbox**

  If you check this, all messages will be sent to the outbox, where you can view and verify that the messages are ok before actually sending them. This can be done in the Message Manager.

  If you do not check the box, the sending of the messages will start as soon as the first chunk is finished.

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