EMAIL TEMPLATES

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OneDealer International GmbH

www.onedealer.com

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Revision History

Revision Date	Revision No.	Revised by	Summary of Changes
28/09/20	2.2	C. Charokopou	Final document consistent with the training delivered in QR3-2020

1 Introduction

This document contains a full guide of how to create new email templates for a customer, prepare them as notifications, configure these notifications and link them with the respective workflow.

Firstly, it is important to understand how to find the email server linked with each project and what is needed to login in this email server. Then, you will find an explanation of all the procedures to create your email templates and finally, a guide of how to link the email templates with the respective workflows inside your OneDealer project.

2 Login in the email Server

Each project is linked with an email server. In order to login in the email server:

1. Follow the email Server URL given to you

OR

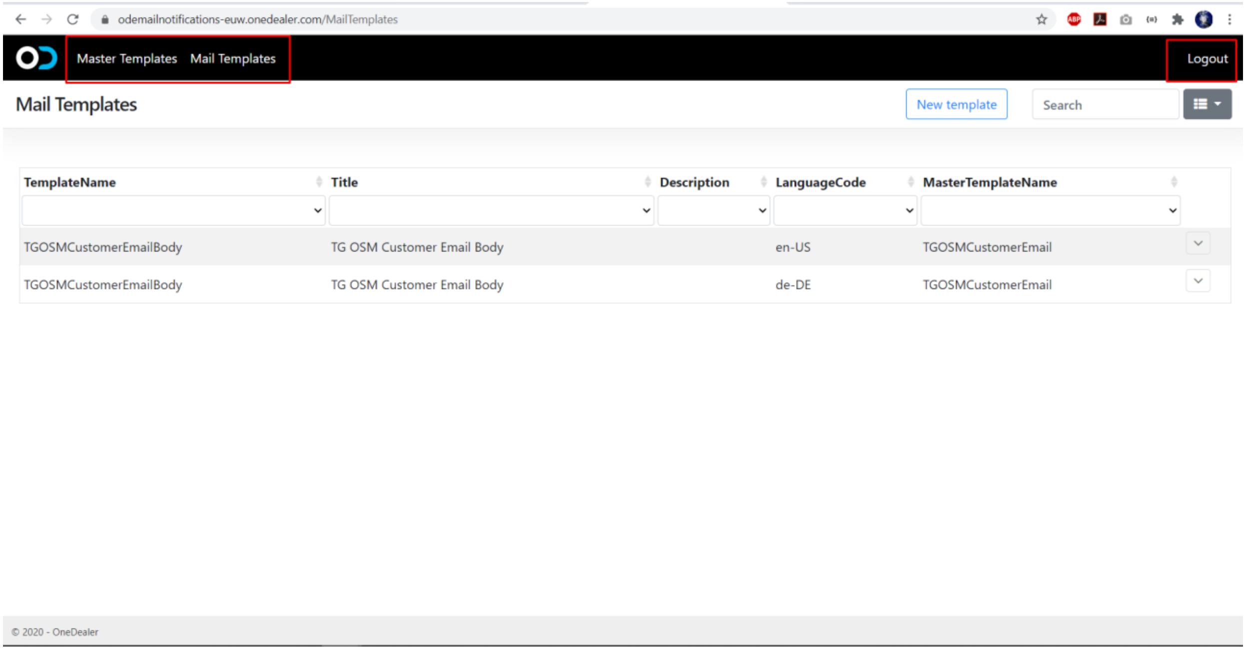
   Find the URL from OneDealer. Login into OneDealer with an admin User -> Main Menu -> Setup -> Administration -> Setup -> Search for the “ODNotificationServiceURL” key -> The URL is the one inside the Entity Value field

2. After following the URL, use your OneDealer credentials to login.
3. First enter your email and press continue. The system will check in how many OneDealer projects, linked with this email server, this email exists as account and bring back a selection.
4. Then select the project/company from the drop-down list “Company”
5. Enter your password and select continue

3 Main Components

In order to create an email template, you need the URL of the email server linked with the project in question. There are three main menu buttons on the top of the page:

- **Master Template**
- **Mail Template**
- **Logout**



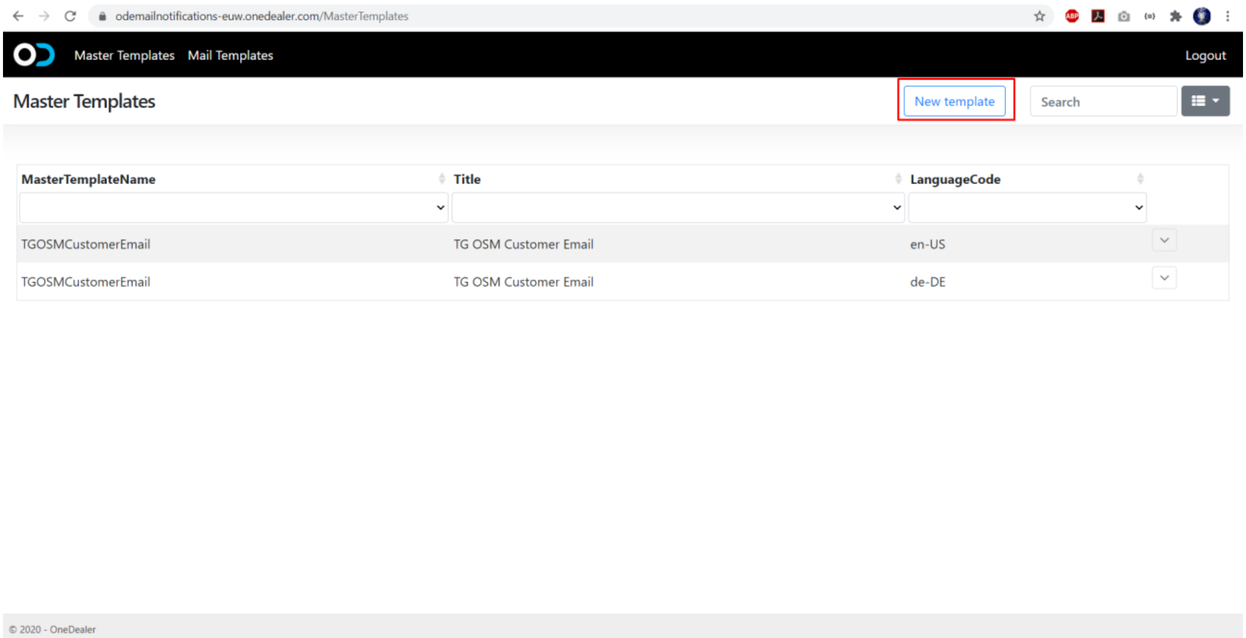
The whole process consists of two steps.

1. **<u>Create "Master Template":</u>** You need to create a "Master Template" for every language. The "Master Template" will contain the common elements exist in all "Mail Templates". i.e. logo, header, footer, etc.
2. **<u>Create "Mail Templates":</u>** You can create all "Mail Templates", which is the content of each email you have, for that specific language and linked them with the "Master Template". i.e. you create one "Master Template" (in English language) and many "Mail Templates" (in the same language).

**Alternatively, the <u>Master Template</u> can be empty and include only the {Body} parameter (more information in page 7) and add all the design every time in <u>Mail Template</u>, even if it is the same for several emails.*

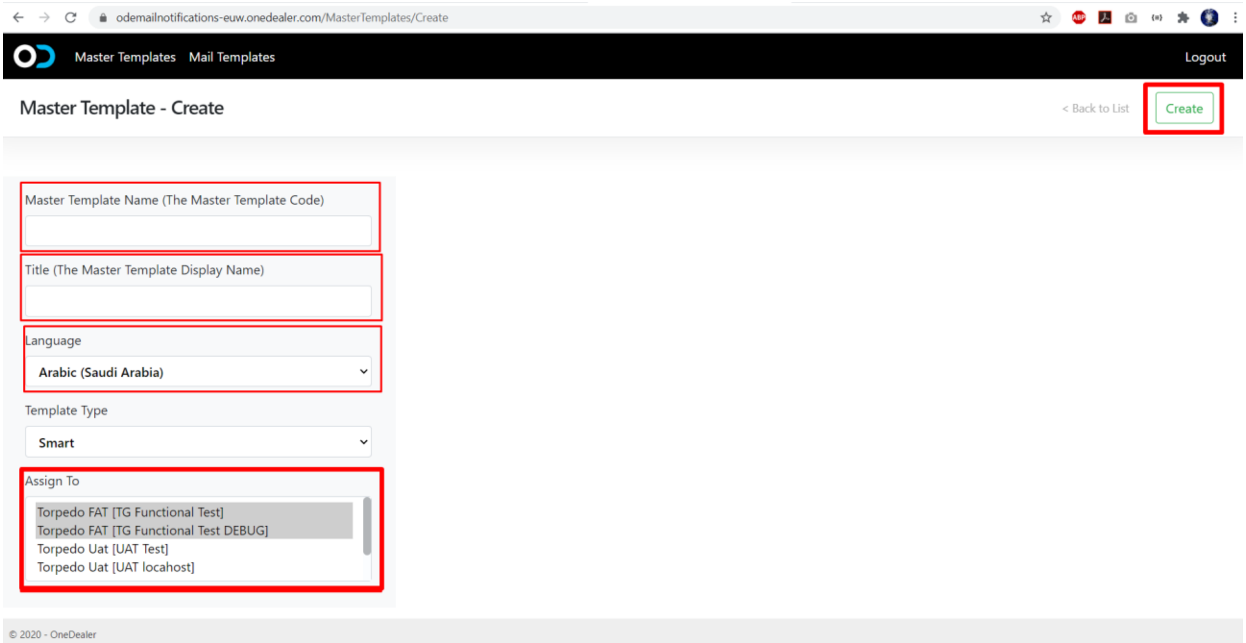
4 Create a “Master Template”

Go to the Master Template and click on **New Template** button located at the top right corner of the page.

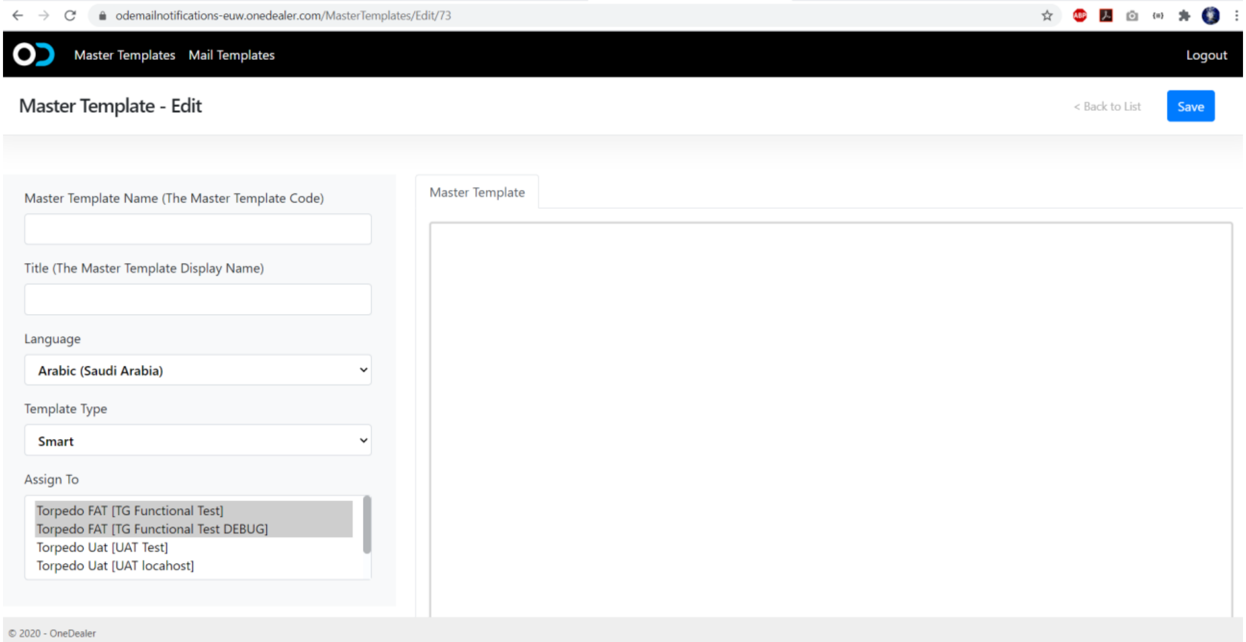


Provide content for the following fields and click on **Create** button.

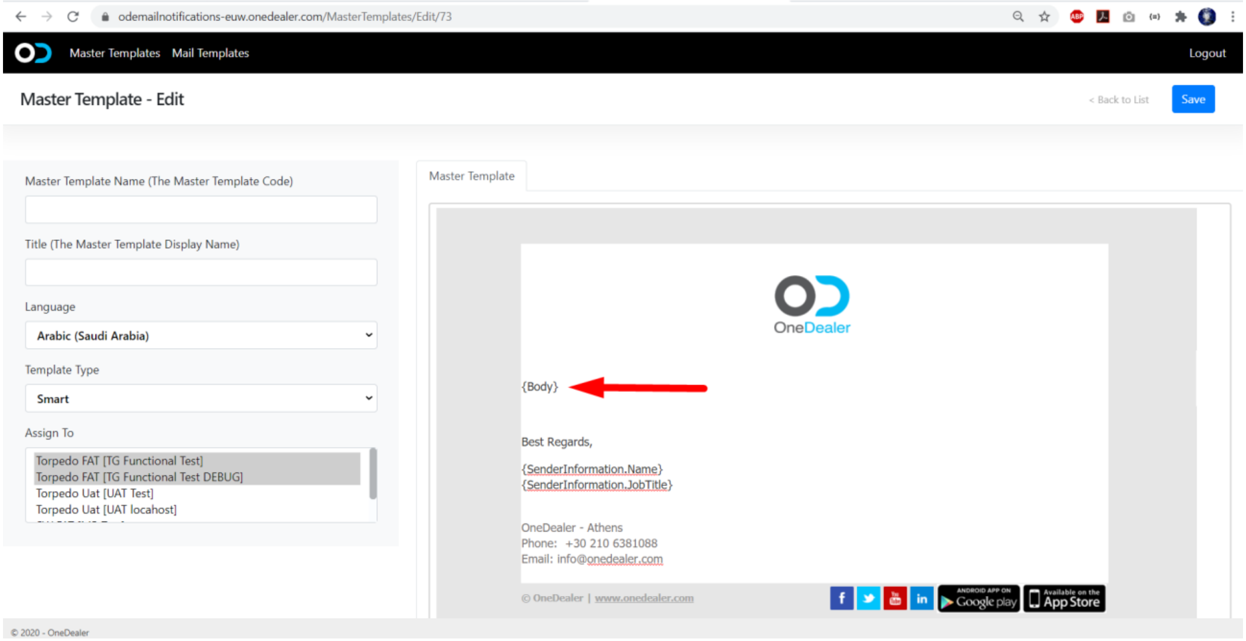
- Master Template Name: Avoid using spaces, this field act as a Template Code.
- Title: Try including the Name of the project within the Master Template Title. i.e.
- Template Type: Ensure that **Smart** is selected
- Language: Select the Language you are planning to create emails for.
- Assign To: Select for which project/customer this email template is for.



Click on **Master Template** box to design the content. The editor line will appear as soon as you click inside the box.



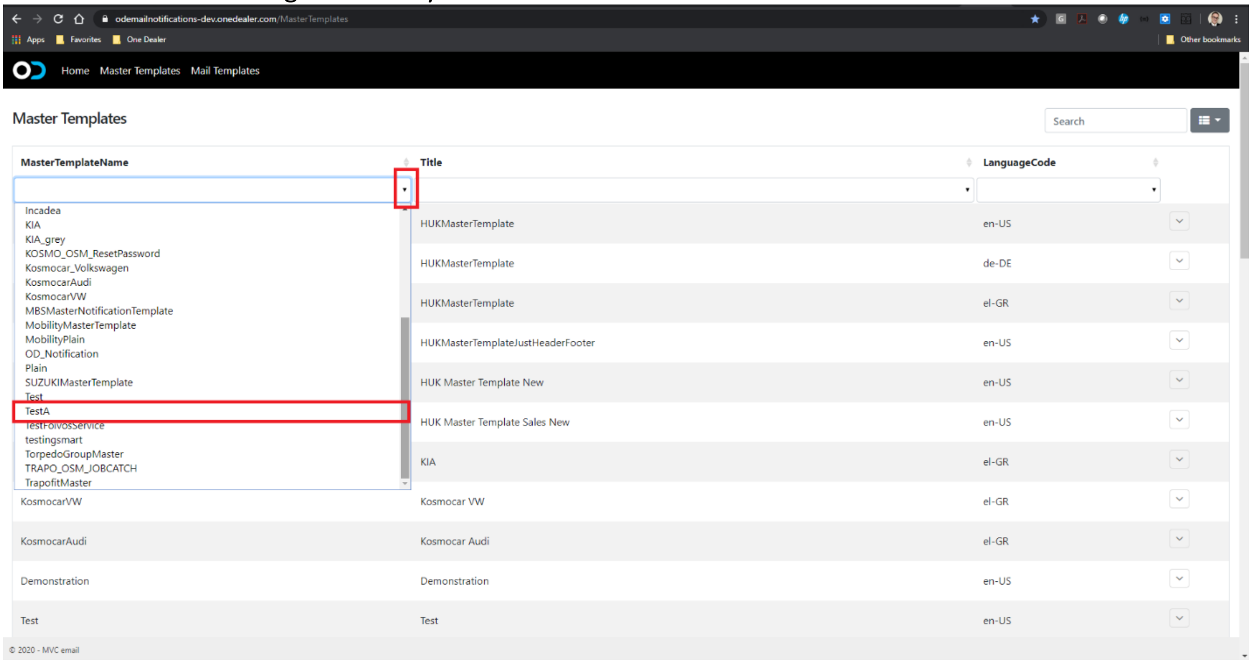
During the design phase of the "Master Template", do not forget to point where the "Mail Template" (Content) will appear, by inserting the parameter **{Body}** at that specific location.



Click on **Save** button (top right corner) to store the changes on the "Master Template".

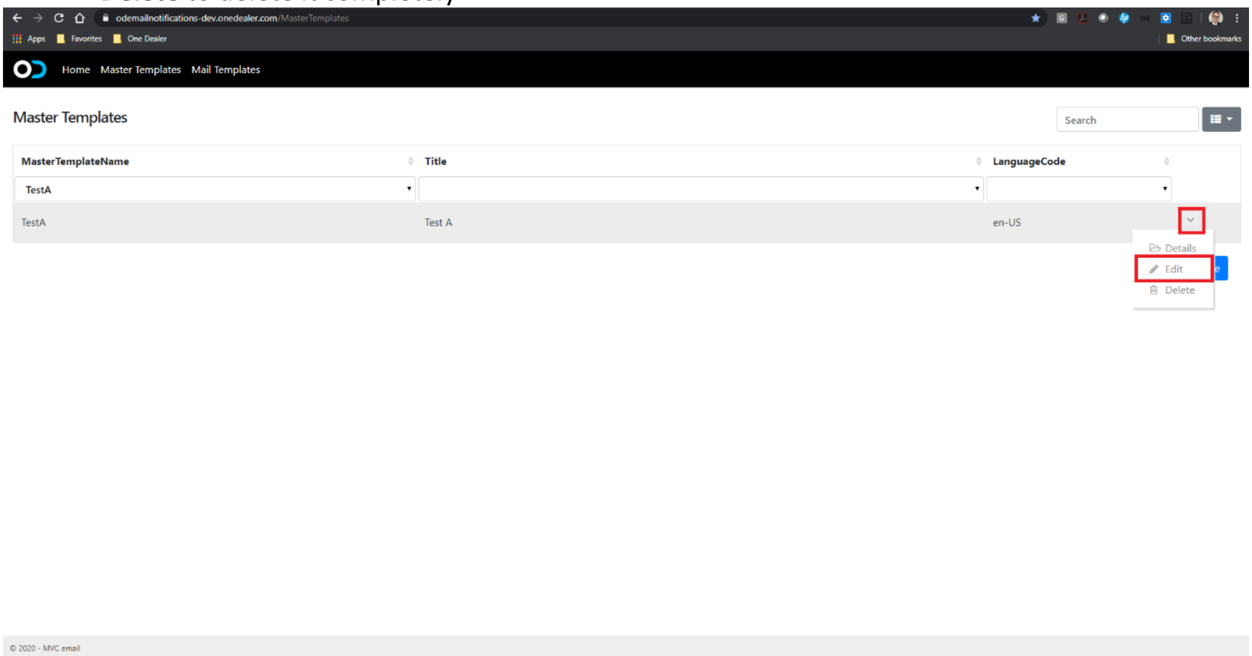
After saving click on **Back to List** (top right corner, next to Save/Edit button) to return on the "Master Template List".

Find the "Master Template" you created by clicking on the field "MasterTemplateName" **downwards arrow icon** and selecting the name you created.



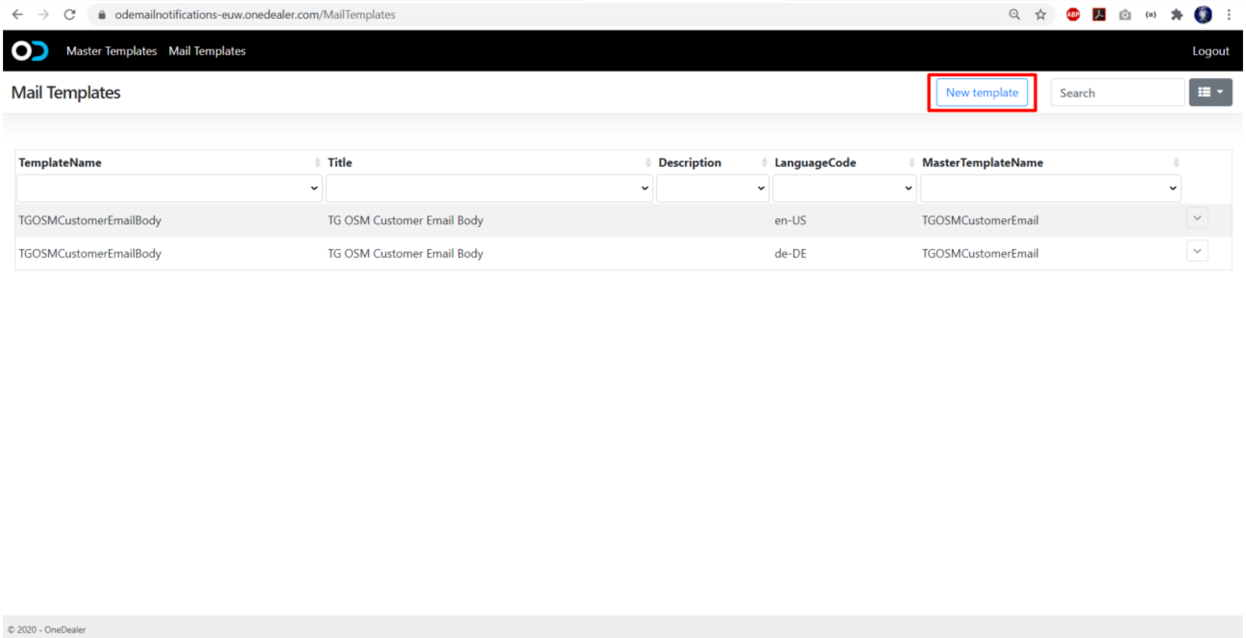
Click on the **downwards arrow icon** located at the right side of the "Master Template" and select:

- **Edit** for further modifications on the "Master Template".
- **Details** just to view the template
- **Delete** to delete it completely

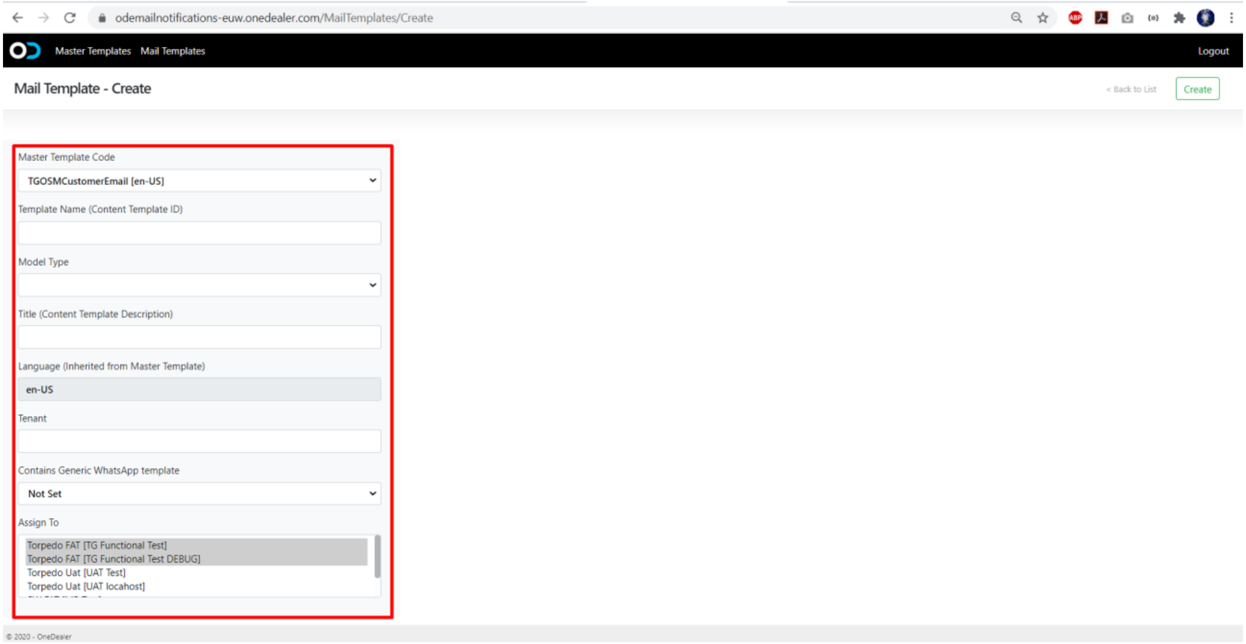


5 Create a "Mail Template"

Go to the Mail Templates and click on **New Template** button located at the top right corner of the page.



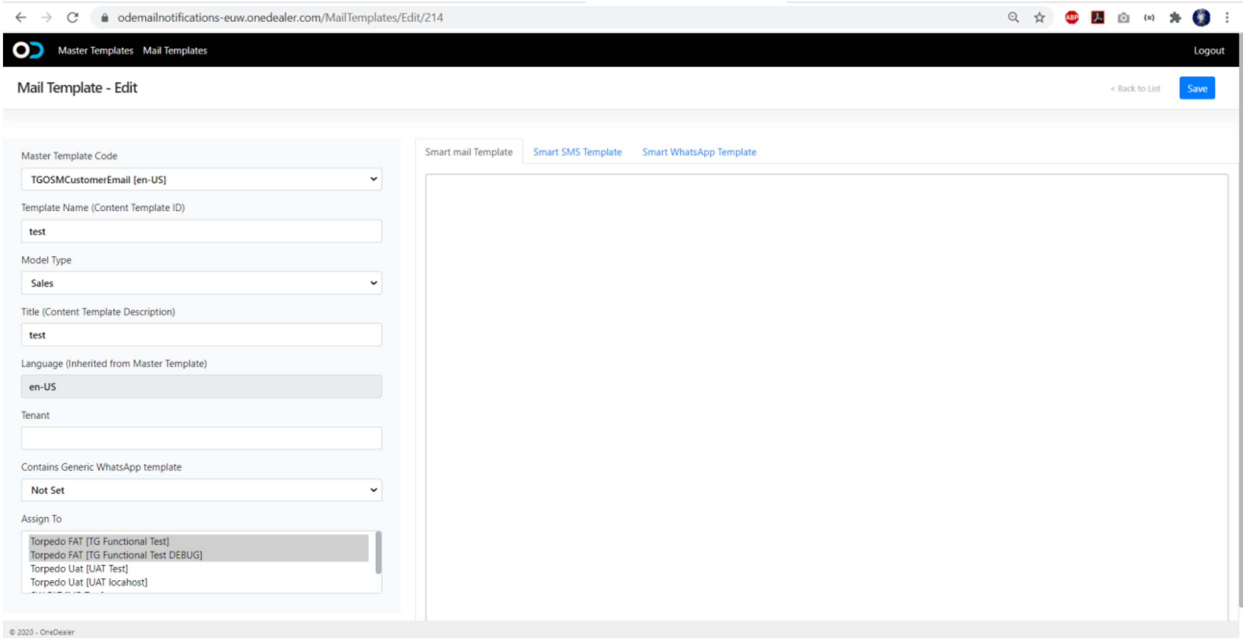
Provide content for the following fields and click on **Create** button.



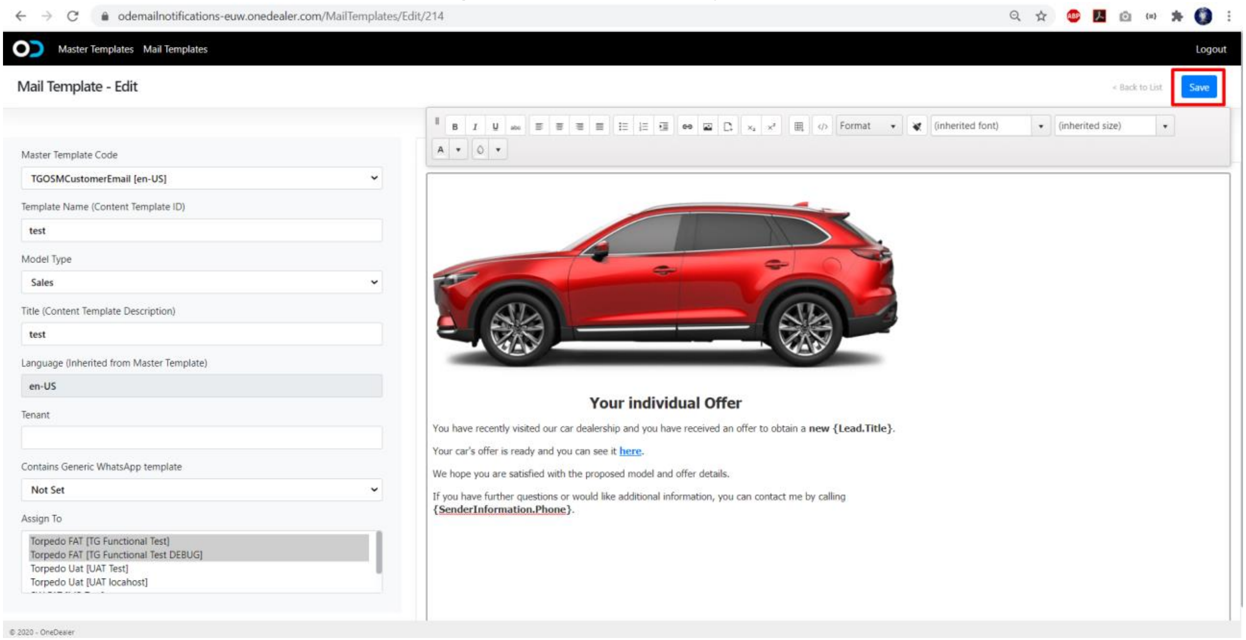
- **Master Template Code:** This field is the one which links the "Mail Template" with the "Master Template" created at the previous step. Here you choose the Master Template that will be used as default for this template
- **Template Name:** Unique identifier for the template
- **Model Type:** Provides extra information based on the business logic (sales, service, complaint, mobility, purchase). Any of those option makes available, **a corresponding set of parameters**, inside the Smart Template.

- **Title:** The title that will be used for the notification (for emails, it'll be the subject)
- **Language:** Inherited from the default Master template (you'll have to create a Master template for each language you want your notifications in)
- **Assign To:** All the installations this template will be usable from

Click on the "**Smart mail Template**" box to design the content.

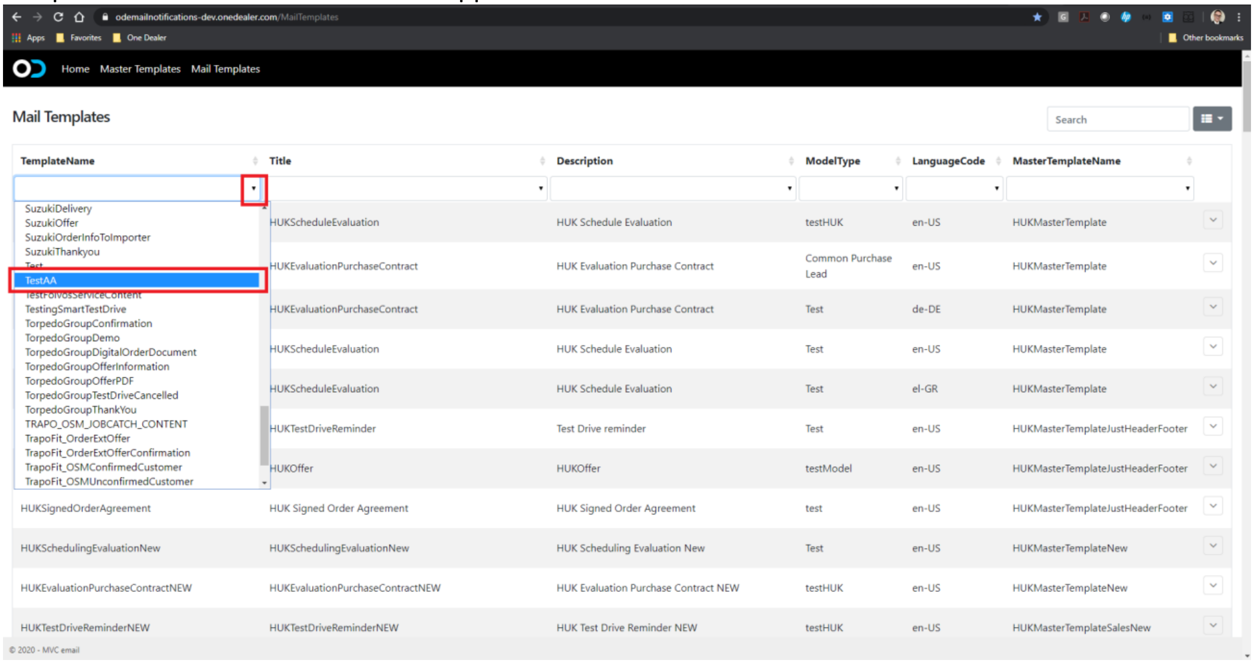


Click on **Save** button to store the changes on the "Mail Template".

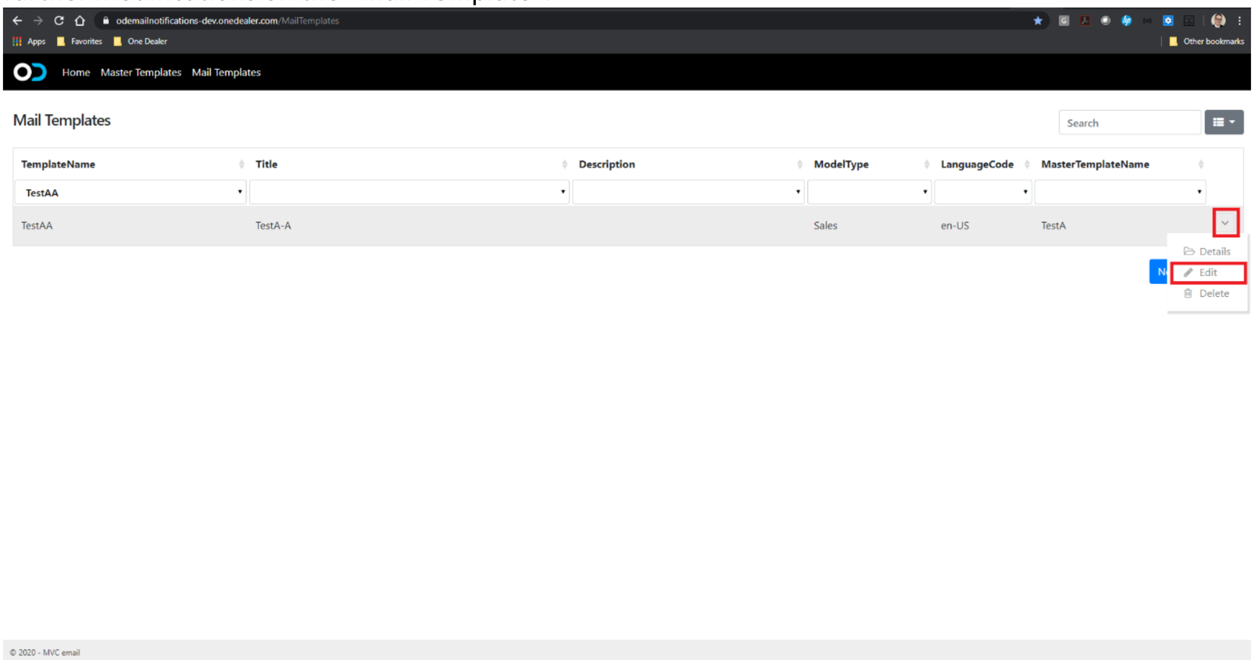


Then click on **Back to List** (top right corner) link to return on the "Mail Template List".

Find the “Mail Template” you created by clicking on the field “TemplateName” **downwards arrow icon** and selecting the name you created. Alternatively, filter with the Master Template and all the mail templates related to this Master will appear in the list



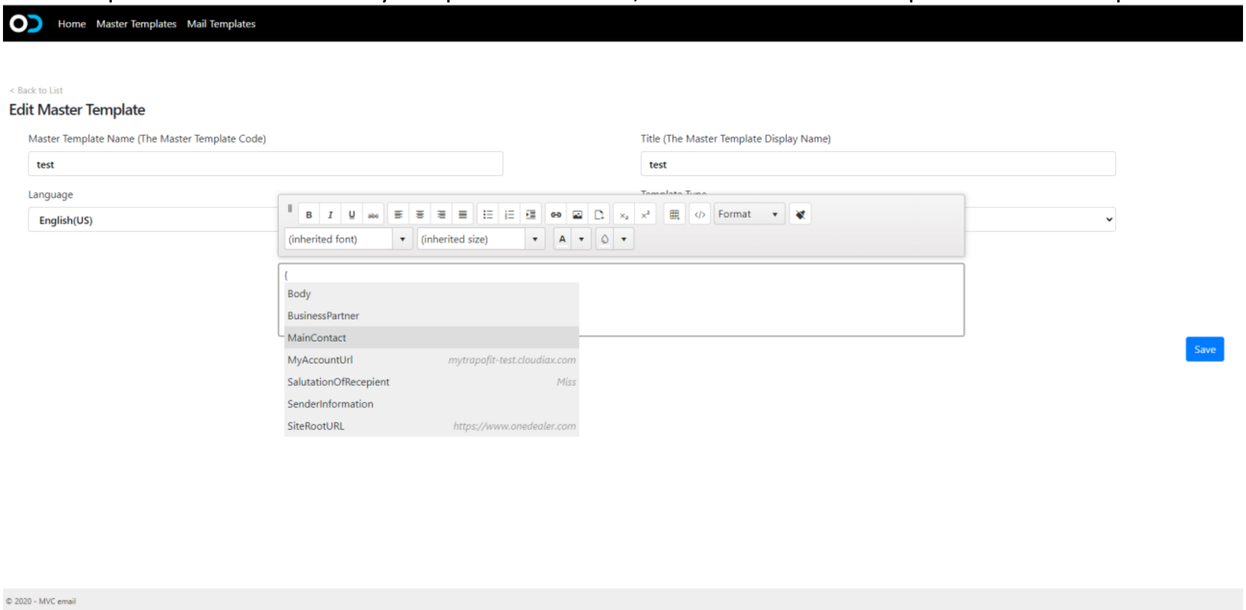
Click on the **downwards arrow icon** located at the right side of the “Mail Template” and select **Edit** for further modifications on the “Mail Template”.



6 Add Parameters

6.1 How to add a parameter

To add parameters within the Templates, open a “bracket **{** ” wherever, within the template, you want to add a parameter. As soon as you open the bracket, the list with available parameters will open.



To write parameters:

- Either write the parameter as it is within the list and then add a dot a new set of parameters, related with the one just written, will appear.
- Or, find the parameter you want using the up/down arrows in the keyboard and once you find the correct one, click on Tab. The system will add the chosen parameter, add a dot and display you the second part. You can choose again using the arrows and clicking on Tab.
- Or use your mouse to select from the list.

A final form of a parameter should be as below:

- {BusinessPartner.FullName}
- {MyAccountUrl}

6.2 Add link of documents

To add a link for an offer or an order document you should:

1. Find the parameter for the document you want. For example: {Offer.OfferAttachmentUrl}
2. Copy the Parameter.
3. Add the word you want to be responsible for the redirection, i.e. Click Here
4. Select the word/phrase and click on the “Insert Hyperlink” button.
5. Replace the Web Address field with the parameter copied above.
6. Add a ToolTip (word/phrase that will be displayed on the mouse over)
7. Select if you want the link to open in a new window.

6.3 Add "Unsubscribe" functionality

To add an unsubscribe button from the OneDealer notifications in your emails you should:

1. Find the relevant parameter by writing {UnsubscribeURLs. and then selecting one of the following:
    - Manual: Just view your enabled communication channels and edit them manually
    - All: Unsubscribe automatically from all channels and allow for further edit
    - Email: Unsubscribe automatically only from Email channel and allow for further edit
    - SMS: Unsubscribe automatically only from SMS channel and allow for further edit
2. Copy the whole Parameter.
3. Add the word you want to be responsible for the redirection, i.e. Unsubscribe Here
4. Select the word/phrase and click on the "Insert Hyperlink" button.
5. Replace the Web Address field with the parameter copied above.
6. Add a ToolTip (word/phrase that will be displayed on the mouse over)
7. Select if you want the link to open in a new window.

By adding these parameters in your email template, when the end User click on it, they will be redirected in an OneDealer page where depending on the parameter you selected above, they will be able to unsubscribe either manual from each channel or automatically.

6.4 Available parameter in the system

According to the type of the template you are working with, a different set of parameters will be available.

- **Master Template:** Here you can find only generic parameter about the Company, the Sender, the Customer/Contact and of course the {Body} parameter which is responsible merging the Master template with each Email template.

- **Mail Template:** As mentioned above (page 9), Mail Templates are split into types (Sales, Service, Purchase, Complaint and Mobility). According to the selected type, a different set of parameters will be available to you during the design process. For example, if sales type is selected, the parameters related with sales leads will be available.

6.4.1 Generic Parameters

- **BusinessPartner**
    - Code
    - FullName
    - BillToAddress
        - Street
        - StreetNo
        - ZipCode
        - City
        - Country
        - Building
        - Block
    - ShipToAddress
        - Street
        - StreetNo
        - ZipCode

        - City
        - Country
        - Building
        - Block
    - Phone1
    - MobilePhone
    - Phone2
    - Fax
    - MainContactPersonName
    - EmailAddress
    - Currency
- **MainContact**
    - Code
    - CityOfBirth
    - DateOfBirth
    - EmailAddress
    - Fax
    - FirstName
    - LastName
    - MiddleName
    - MobilePhone
    - FullName
    - Phone1
    - Phone2
    - Profession
    - Title
    - HomeWebsite
    - VocativeFirstName
    - VocativeLastName
    - WorkCompanyName
- **SenderInformation**
    - Name
    - Email
    - Phone
    - Company
    - Branch
    - Facebook
    - Twitter
    - Youtube
    - JobTitle
- **MyAccountUrl**
- **SalutationOfRecepient**
- **SiteRootURL**
- **UnsubscribeURLs**
    - Manual
    - All
    - Email
    - SMS
    - WhatsApp

6.4.2 Parameters per Type

1. **For Sales:**
   - Lead
     - SalesPersonName
     - SalesPersonEmail
     - NextActivityDate
     - NextActivityTime
     - NextActivityTime
     - LastUpdateTime
     - CreateDate
     - CreateTime
     - Title
     - Make
   - Offer
     - Title
     - OfferAttachmentUrl
     - NetTotalAmount
     - TotalDiscountAmount
     - DocDiscountPercent
     - VatSum
     - NetAfterDiscountAmount
     - TotalAmount
     - CreationDate
   - Order
     - Title
     - OfferAttachmentUrl
     - NetTotalAmount
     - TotalDiscountAmount
     - DocDiscountPercent
     - VatSum
     - NetAfterDiscountAmount
     - TotalAmount
     - CreationDate
     - CreationTime
     - DeliveryDate
     - DeliveryTime
   - TestDrive
     - StartDateDescription
     - StartTimeDescription
     - Model
     - Family
     - VehicleImageLink
     - Make
   - LeafletLink
2. **For Service:**
   - JobOrder
     - BookingCode
     - ModelDescription
     - DocNum
     - LicPlate

  - ScheduledEntryDateUTC_Date
  - ScheduledEntryDateUTC_Time
  - ScheduledDueDateUTC_Date
  - ScheduledDueDateUTC_Time
  - Packages
  - NetPrice
  - TotalPrice
  - Code
  - OfferPath
  - OrderExtensionPath
  - OrderExtensionPackages
  - Labors
  - HeaderPrices
    - NetPrice
    - VatAmount
    - TotalPrice
  - CustomerConcernPrices
    - NetPrice
    - VatAmount
    - TotalPrice
  - OrderExtPrices
    - NetPrice
    - VatAmount
    - TotalPrice
- CourtesyVehicle
  - Make
  - Model
  - LicensePlate

3. For Purchase

- PurchaseLead
  - DocEntry
  - U_IDMS_VehicleCodeCreated
  - U_IDMS_PriceRequested
  - U_IDMS_PricePreEvaluated
  - U_IDMS_PriceEvaluated
  - U_IDMS_PricePurchased
  - U_IDMS_EvaluationStartDate
  - U_IDMS_EvaluationStartTime
  - U_IDMS_EvaluationEndDate
  - U_IDMS_EvaluationEndTime
  - U_IDMS_EvaluationScheduleStartDate
  - U_IDMS_EvaluationScheduleStartTime
  - U_IDMS_EvaluationScheduleEndDate
  - U_IDMS_EvaluationScheduleEndTime
  - U_IDMS_Make
  - U_IDMS_Model
  - U_IDMS_VIN
  - U_IDMS_EvaluationPlaceBranchCode

7 Design a Template

The most common way to design a template (Master or Mail) is to cooperate with a designer, give him the design of the templates and they are responsible to create for you the html of each template. However, there are also few more ways:

1. Get the HTML from a professional designer and add it in the template from the “View HTML” button.
2. If the template is really simple, design it directly within the editor, using the given tools
3. Prepare some elements in Word and copy/paste them.
4. Use one of the many available free email designers in the internet. Get the the HTML when it’s ready and add it in the editor using the “View HTML” button.

*** Remember:** To add photos and pictures within your templates you should **not** copy paste them from another file. Pictures should be uploaded into the directory of the email server and pulled within the template from the directory.

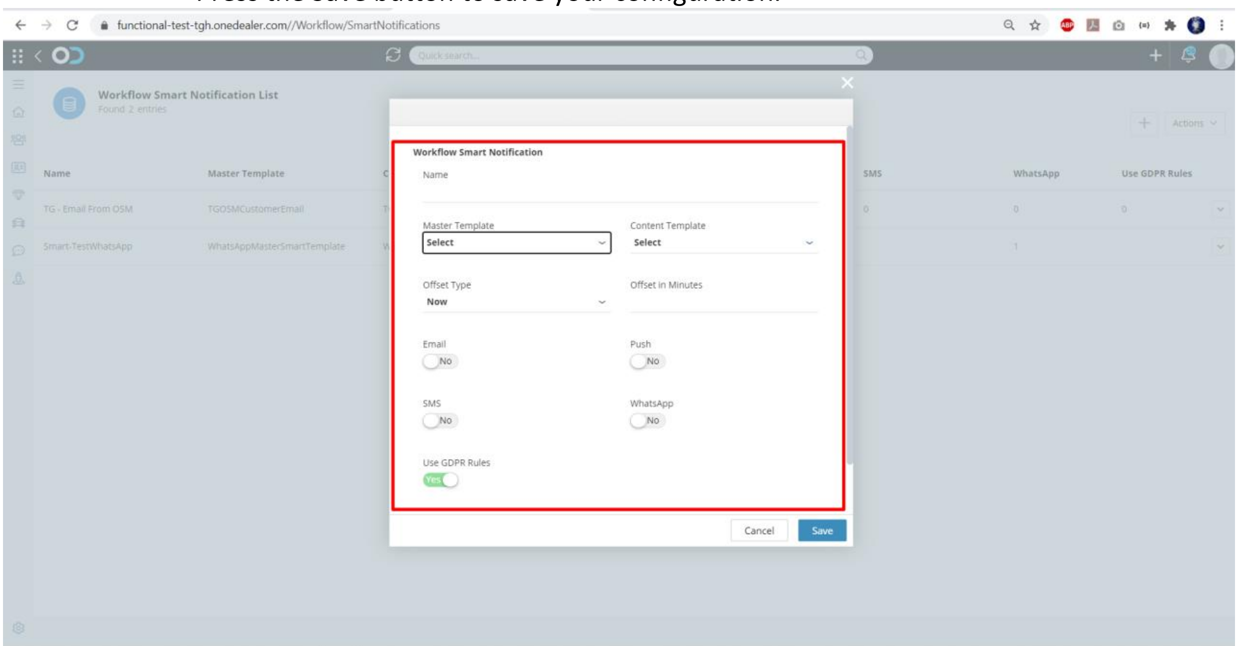
8 Link Templates with respective Workflows

8.1 Prepare the notification

In order for the email templates, made in the previous steps, to actually work and be able to be send during a business process, they have to be linked with each respective workflow and the specific transition.

1. Open the OneDealer environment of your project and find the Email Notification List. There are two ways to do this:
   a. Search in the menu for the "Notification Template List"
      There you will find a list with all the notifications exist in your database (Smart and Razor Type)
   b. Open the respective Workflow you would like to work with and on the top right corner, click on the three horizontal lines button "Smart Notification" (next to the Actions). There you will find a list of the notifications exist in your database of type **Smart** only.

2. In whichever of the above ways you decide to access the list, click on the plus + button, top right corner, to create a new notification for your previous made templates.
3. A pop-up window will appear. Fill up the fields accordingly.
   - **Name:** Add a description for your notification, i.e. OD – Thank you for your interest
   - **Master Template / Content Template:** Select the correct selection of Master and Mail templates. (Make sure the same language templates are selected)
   - **Offset Type:** Select what you will consider as starting point for your email to be planned and send
   - **Offset in Minutes:** Add the offset time in minutes (i.e.: If you select Now in Offset Type and add 60 in Offset in Minutes, the email will be sent 60 Minutes after you save the activity that you have linked with this notification)
   - Enable the respective switch of what kind of notification this is, i.e. Email
   - Select if it should always follow GDPR rules.
   - Press the Save button to save your configuration.



8.2 Link Notification and Workflow

Now it's time to add the configured notification into the workflow transitions (steps) you want them to be triggered from.

1. Open the Workflow in question
2. Find the Transitions you want to add the already made notification. You can locate the transitions:
    a. Within the workflow designer (all the arrows that reach the activity result you want). I.e. Create Offer Activity – all the arrows (transitions) that have the Create Offer as result.
    b. Within the Transition tab by searching the transition name
3. Once you find the transitions in question, click on edit
4. Go the Notification Type Code field, search and add the notification in question from the available drop-down list.
   Remember: Notifications made using Smart Templates will get a "Smart -" prefix in front of the name given by you.
5. If you want the notification to be send to the customer, after an amount of time before the next planned activity, add in field "Notification Offset Value" this amount in minutes. i.e. 60 (The notification will be sent one hour before the next planned activity)

8.3 Group of Notifications

In case there is a need of several emails to be send all together in one workflow step, follow the below steps:

1. Prepare the Notification Templates as described in step 6.1
2. Find in the menu the "Notifications Group List" and open it
3. There you will find a list of all the Notification Groups already made in your environment
4. Click on the plus + button, top right corner
5. A pop-up window will appear. Add a description for your Notification group and click on the plus blue button:
    a. The list of the notifications will appear
    b. Select the notifications that should be added to this Group and save the selection
6. Save the Notification Group
7. Add the Notification Group instead the plain Notification in the transition steps, as described in the "Link Notification and Workflow" section above.