

EMAIL TEMPLATES YEAR 2020

OneDealer International GmbH www.onedealer.com

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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

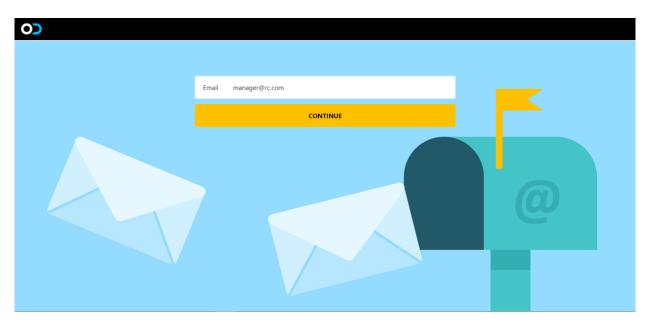
Each project is linked with an email server. In order to login in the email server:

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 <u>"ODNotificationServiceURL"</u> 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



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Email	nanager@rc.com	
Company	New Demo 2 [OneDealer]	·
Password	Kosmocar [KARENTA A.E.] Kosmocar [KARENTA A.E.] HUK [HUK] HUK [HUK] New Demo [OneDealer] New Demo [OneDealer] My Onedealer [My OD Dev] My Onedealer [My OneDealer] SW FAT [MB Test] SW FAT [MB Test] SW FAT [MB Test] AVAG FAT [AVAG Autoarena Key Test DEBUG] Trapofit [ATRLSFPROD] Trapofit [ATRLSFPROD] Trapofit [LOCALHOST TEST] HUK TEST [HUK Test local] New Demo 2 [OneDealer]	0



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 (pages) on the header of the website:

- Master Templates
- Mail Templates
- Document Templates

In addition, four more important UI elements can be found at the top right corner of each page:

- Logout: By clicking it the User can logout completely from the application.
- **New Template:** With this button the user can create a new Template, based on which page they are.
- Search: Help the user search for content within the page
- **Filter Button:** Here the user can select which filter should be available in the current page. Each page has a different set of possible filters

Master Templates Mail Templates Document Templates			Logout		
Master Templates	Master Templates New template Search				
MasterTemplateName	Title	LanguageCode	\$		
		×	~		
DemonstrationSmart	DemonstrationSmart	en-US	~		
DemonstrationSmart	DemonstrationSmart	en-GB	~		
DemonstrationSmart	DemonstrationSmart	el-GR	~		
DemonstrationSmart	DemonstrationSmart	de-DE	~		
DemonstrationSmart	DemonstrationSmart	es-ES	~		
DemonstrationSmart	DemonstrationSmart	ru-RU	~		
DemonstrationSmart	DemonstrationSmart	nl-NL	~		
DemonstrationSmart	DemonstrationSmart	uk-UA	~		

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In this document we will talk about Notification Templates, for Document Templates consult the respective configuration document document.

The whole process consists of two steps.

- <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.
- <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.



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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.

← → C	ates	A 😃 🖪 🗠 🌟 🄇
Master Templates Mail Templates		Logout
Master Templates		New template Search 🖽 👻
MasterTemplateName	🔶 Title	LanguageCode
TGOSMCustomerEmail	TG OSM Customer Email	en-US
TGOSMCustomerEmail	TG OSM Customer Email	de-DE 🗸

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→ C 🔒 oder

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 **<u>Smart</u>** is selected

ilnotifications-euw.onedealer.com/Maste

- Language: Select the Language you are planning to create emails for.
- Assign To: Select for which project/customer this email template is for.

Master Templates Mail Templates		Logou
Master Template - Create	< Back to List	Create
Master Template Name (The Master Template Code)		
Title (The Master Template Display Name)		
Language Arabic (Saudi Arabia)		
Template Type		
Smart ~		
Assign To Torpedo FAT [TG Functional Test] Torpedo FAT [TG Functional Test DEBUG] Torpedo Uat [UAT Test] Torpedo Uat [UAT locahost]		



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

← → C	x 🤨 💆 🗆 🗮 👔 🔅
Master Templates Mail Templates	Logout
Master Template - Edit	< Back to List Save
Master Template Name (The Master Template Code) Master Template	
Title (The Master Template Display Name)	
Arabic (Saudi Arabia) 🗸	
Template Type	
Smart ~	
Assign To Torpedo FAT [TG Functional Test] Torpedo FAT [TG Functional Test DEBUG] Torpedo Uat [UAT Test] Torpedo Uat [UAT locahost]	
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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.

← → C a odemailnotifications-euw.onedealer.com/MasterTempla	ies/Edit/73	(☆ 🥗 📙 🖻 🦛 🎘 🚺
Master Templates Mail Templates		Logout
Master Template - Edit		< Back to List Save
Master Template Name (The Master Template Code)	Master Template	
Title (The Master Template Display Name)		
Language Arabiz (Saudi Arabia)	OneDealer	
Arabic (Saudi Arabia) ~		
Smart	{Body}	
Assign To Torpedo FAT [TG Functional Test] Torpedo FAT [TG Functional Test DEBUG] Torpedo Uat [UAT Test] Torpedo Uat [UAT Test] Torpedo Uat [UAT Test]	Best Regards, {SenderInformation.Name} {SenderInformation.JobTitle}	
initen narfori ingunat	OneDealer - Athens Phone: +30 210 6381088 Email: Info@ <u>onedealer.com</u>	
	© OneDealer ywww.onedealer.com 🕴 🔽 💩 in	ANDROID APP ON GOOgle play
2020 - OneDealer		

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.

	MasterTemplates	★ 🖬 7. ● 🏘 💀 🖬 🔝 🙀
Home Master Templates Mail Templates		
1aster Templates		Search 🗮 -
MasterTemplateName	Title	LanguageCode
Incadea KIA KIA_grey	• HUKMasterTemplate	• • • • • • • • • • • • • • • • • • •
KOSMO_OSM_ResetPassword Kosmocar_Volkswagen KosmocarAudi	HUKMasterTemplate	de-DE 🗸
Kosmocar/W MBSMasterNotificationTemplate MobilityMasterTemplate DD_Notification Plain SUZUKIMasterTemplate Test	HUKMasterTemplate HUKMasterTemplateJustHeaderFooter	el-GR 👻 en-US 👻
	HUK Master Template New	en-US 🗸
FestA lestFolvosservice lestingsmart	HUK Master Template Sales New	en-US 💙
orpedoGroupMaster IRAPO_OSM_JOBCATCH irapofitMaster	KIA	el-GR 🗸
osmocarVW	Kosmocar VW	el-GR 🗸
osmocarAudi	Kosmocar Audi	el-GR 🗸
emonstration	Demonstration	en-US 🔍
est	Test	en-US 🗸
020 - MVC email		

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

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igstarrow igstarro	MasterTemplates	* 🖬 🗠 🙆 🖬 🕄 🖗 🗄
🔢 Apps 🛄 Favorites 🛄 One Dealer		Other bookmarks
Home Master Templates Mail Templates		
Master Templates		Search 🗮 *
MasterTemplateName	0 Title	🕸 LanguageCode 👳
TestA	•	•
TestA	Test A	en-US 🗸
		▷ Details ✓ Edit ③ Delete



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.

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Master Templates Mail Template	5				Logout
Mail Templates				New template Search	≣ *
TemplateName	Title	Description	LanguageCode	MasterTemplateName	¢ •
TGOSMCustomerEmailBody	TG OSM Customer Email Body		en-US	TGOSMCustomerEmail	~
TGOSMCustomerEmailBody	TG OSM Customer Email Body		de-DE	TGOSMCustomerEmail	~

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

← → C (a odemailnotifications-euw.onedealer.com/MailTemplates/Create	ର୍ 🕁 🤓 📕 🙆 🗰
Master Templates Mail Templates	
Mail Template - Create	< Back to List
Master Template Code	
TGOSMCustomerEmail [en-US]	
Template Name (Content Template ID)	
Model Type	
▼	
Title (Content Template Description)	
Language (Inherited from Master Template)	
en-US	
Tenant	
Contains Generic WhatsApp template	
Not Set	
Assign To	
Torpedo FAT [TG Functional Test] Torpedo FAT [TG Functional Test DEBUG]	
Torpedo Uat (UAT Test) Torpedo Uat (UAT Test)	
lorpedo dat (dvi locanost)	

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- 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.

\leftarrow \rightarrow C ($``a$ odemailnotifications-euw.onedealer.com/MailTemplates/	Edit/214	२ 🛧 👳	🔼 🙆 👄 🗯 🎒 🗄
Master Templates Mail Templates			Logout
Mail Template - Edit			< Back to List Save
Master Template Code	Smart mail Template Smart SMS Template Smart WhatsApp Template		
TGOSMCustomerEmail [en-US]			
Template Name (Content Template ID)			
test			
Model Type			
Sales 🗸			
Title (Content Template Description)			
test			
Language (Inherited from Master Template)			
en-US			
Tenant			
Contains Generic WhatsApp template			
Not Set 🗸			
Assign To			
Torpedo FAT [TG Functional Test] Torpedo FAT [TG Functional Test DEBUG]			
Torpedo Uat [UAT Test] Torpedo Uat [UAT locahost]			

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

log
< Back to List Save
I B J U us B B E E E E E E U v format ▼ W (inherited font) ▼ (inherited size) ▼ A • 0 ▼ • • • • • •
Your individual Offer
You have recently visited our car dealership and you have received an offer to obtain a new {Lead.Title}.
Your car's offer is ready and you can see it <u>here</u> . We hope you are satisfied with the proposed model and offer details.
we nope you are satislied with the proposed model and orier details. If you have further questions or would like additional information, you can contact me by calling
SenderInformation.Phone}.

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

					Search	
TemplateName	🕆 Title	Description	ModelType	LanguageCode	MasterTemplateName	
	•	•	•	•	•	
SuzukiDelivery SuzukiOffer SuzukiOrderInfoToImporter	HUKScheduleEvaluation	HUK Schedule Evaluation	testHUK	en-US	HUKMasterTemplate	
rukiThankyou tAA	HUKEvaluationPurchaseContract	HUK Evaluation Purchase Contract	Common Purchase Lead	en-US	HUKMasterTemplate	
iestFolvosserviceContent festingSmartTestDrive forpedoGroupConfirmation	HUKEvaluationPurchaseContract	HUK Evaluation Purchase Contract	Test	de-DE	HUKMasterTemplate	
TorpedoGroupDemo TorpedoGroupDigitalOrderDocument TorpedoGroupOfferInformation	HUKScheduleEvaluation	HUK Schedule Evaluation	Test	en-US	HUKMasterTemplate	
TorpedoGroupOfferPDF TorpedoGroupTestDriveCancelled TorpedoGroupThankYou	HUKScheduleEvaluation	HUK Schedule Evaluation	Test	el-GR	HUKMasterTemplate	
IRAPO_OSM_JOBCATCH_CONTENT IrapoFit_OrderExtOffer IrapoFit_OrderExtOfferConfirmation	HUKTestDriveReminder	Test Drive reminder	Test	en-US	HUKMasterTemplateJustHeaderFooter	
TrapoFit_OSMConfirmedCustomer TrapoFit_OSMConfirmedCustomer TrapoFit_OSMUnconfirmedCustomer	HUKOffer	HUKOffer	testModel	en-US	HUKMasterTemplateJustHeaderFooter	
UKSignedOrderAgreement	HUK Signed Order Agreement	HUK Signed Order Agreement	test	en-US	HUKMasterTemplateJustHeaderFooter	
UKSchedulingEvaluationNew	HUKSchedulingEvaluationNew	HUK Scheduling Evaluation New	Test	en-US	HUKMasterTemplateNew	
JKEvaluationPurchaseContractNEW	HUKEvaluationPurchaseContractNEW	HUK Evaluation Purchase Contract NEW	testHUK	en-US	HUKMasterTemplateNew	
IUKTestDriveReminderNEW	HUKTestDriveReminderNEW	HUK Test Drive Reminder NEW				

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".

← → C ☆ ● odemailnotifi III Apps ■ Favorites ■ One Dealer	ications-dev.onedealer.com/MailTemplates				* C 🛛 🛛 🧳 🚥	🖸 📃 🏟
Home Master Templat	tes Mail Templates					
Mail Templates					Search	≡ -
TemplateName	† Title	Description	ModelType	LanguageCode	e 🕴 MasterTemplateName	\$
TestAA	•	•	•	•	•	•
TestAA	TestA-A		Sales	en-US	TestA	~
						Details
						Delete

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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.

laster Template Name (The Master Template Co	ode)		Title (The Master Template Disp	lay Name)	
test			test		
anguage			Tamplata Tuna		
English(US)	■ B I U alo = = = =	E E E 😁 🖬 🗅 🤉	≤ ₂ × ² Ⅲ ↔ Format ▼	*	~
	(inherited font) (inherited size	e) • A • O •	•		
	Body				
	BusinessPartner				
	MainContact				
	MyAccountUrl mytrapo	ofit-test.cloudiax.com			
	SalutationOfRecepient	Miss			
	SenderInformation				
	SiteRootURL https://	/www.onedealer.com			

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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
 - o Code
 - o FullName
 - BillToAddress
 - Street
 - StreetNo
 - ZipCode
 - City
 - Country
 - Building
 - Block
 - ShipToAddress
 - Street
 - StreetNo
 - ZipCode
 - City
 - Country
 - Building
 - Block
 - Phone1
 - MobilePhone
 - o Phone2
 - o Fax



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

6.4.2 Parameters per Type

- 1. For Sales:
 - Lead
- \circ SalesPersonName
- \circ SalesPersonEmail
- \circ NextActivityDate
- \circ NextActivityTime
- \circ NextActivityTime
- LastUpdateTime
- CreateDate



- CreateTime
- o Title
- o Make
- Offer
 - o Title
 - \circ OfferAttachmentUrl
 - \circ NetTotalAmount
 - \circ TotalDiscountAmount
 - DocDiscountPercent
 - \circ VatSum
 - \circ NetAfterDiscountAmount
 - \circ TotalAmount
 - \circ CreationDate
- Order
 - \circ Title
 - \circ OfferAttachmentUrl
 - \circ NetTotalAmount
 - TotalDiscountAmount
 - $\circ \ {\rm DocDiscountPercent}$
 - \circ VatSum
 - \circ NetAfterDiscountAmount
 - \circ TotalAmount
 - \circ CreationDate
 - \circ CreationTime
 - \circ DeliveryDate
 - \circ DeliveryTime
- TestDrive
 - StartDateDescription
 - \circ StartTimeDescription
 - \circ Model
 - \circ Family
 - \circ VehicleImageLink
 - Make
 - LeafletLink

Leaf Error Service:

- JobOrder
 - BookingCode
 - \circ ModelDescription
 - \circ DocNum
 - \circ LicPlate
 - ${\rm o} \; {\rm ScheduledEntryDateUTC_Date}$
 - \circ ScheduledEntryDateUTC_Time
 - $\circ \ {\tt ScheduledDueDateUTC_Date}$
 - ScheduledDueDateUTC_Time
 - \circ Packages
 - \circ NetPrice
 - $\circ \, \text{TotalPrice}$
 - $\circ \, {\rm Code}$
 - \circ OfferPath
 - OrderExtensionPath
 - $\circ \ {\rm OrderExtensionPackages}$
 - $\circ \, \text{Labors}$
 - HeaderPrices



- NetPrice
- VatAmount
- TotalPrice
- CustomerConcernPrices
 - NetPrice
 - VatAmount
 - TotalPrice
- OrderExtPrices
 - NetPrice
 - VatAmount
 - TotalPrice
- CourtesyVehicle
 - \circ Make
 - Model
 - LicensePlate

3. For Purchase

- PurchaseLead
 - DocEntry
 - $\circ ~ {\sf U_IDMS_VehicleCodeCreated}$
 - \circ U_IDMS_PriceRequested
 - o U_IDMS_PricePreEvaluated
 - $\circ \text{ U_IDMS_PriceEvaluated}$
 - $\circ \text{ U_IDMS_PricePurchased}$
 - \circ U_IDMS_EvaluationStartDate
 - $\circ \text{ U_IDMS_EvaluationStartTime}$
 - $\circ ~ \text{U_IDMS_EvaluationEndDate}$
 - $\circ \text{ U_IDMS_EvaluationEndTime}$
 - ${\rm o} ~ {\rm U_IDMS_EvaluationScheduleStartDate}$
 - o U_IDMS_EvaluationScheduleStartTime
 - ${\rm o} ~ {\rm U_IDMS_EvaluationScheduleEndDate}$
 - $\circ ~ {\sf U_IDMS_EvaluationScheduleEndTime}$
 - $\circ \text{ U_IDMS_Make}$
 - $\circ \text{ U_IDMS_Model}$
 - U_IDMS_VIN
 - $\circ ~ {\sf U_IDMS_EvaluationPlaceBranchCode}$



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. Export the HTML from this designer, 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. Notification Preparation

8.1 Notification Templates

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:
 - 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). This is the same as the previews list (a.) but filtered out automatically to show **only** Smart templates.
 - b. You can also access this list using this URL: /Workflow/SmartNotifications
- 2. For **Smart Notifications** preferable use way (b.). 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 linked (related) activity)
 - Enable the respective switch of what kind of notification this is, i.e. Email or Email and WhatsApp
 - Select if it should always follow GDPR rules.
 - Press the Save button to save your configuration.

4	> C	functional-test-tgh.onedealer.com/	//Workflow/SmartNotif	fications				Q 🕁 🧶 🛽	🗈 🕫 🗯 🊺 🗄
	< 0)		S	Quicksearch				+ 🗳 🔵	
11 G 21		Workflow Smart Notification List Found 2 entries				×			+ Actions ~
	Name	Master Template	с	Workflow Smart Notification		s	5MS	WhatsApp	Use GDPR Rules
			nall T	Master Template	Content Template	0			
			nartTemplate W	Select	~ Select	~			
				Offset Type New SMS No Use GDRR Rules	Offset in Minutes	ncel Save			
8									



8.2 Group of Notifications

To cover the need of several emails, send all together in one workflow step, follow the below steps. This should be prepared even if they include only one notification inside:

- 1. Prepare the Notification Templates as described in step 8.1
- 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 already prepared Notification Templates will appear
 - b. Select the notifications that should be added to this Group and save the selection
- 6. Save the Notification Group



9. Link Templates with Processes

9.1 Link Notification with Workflow (Sales, Purchase & Complain Case)

In order to add the configured notifications 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 template (or notification group).

You can locate the transitions:

- 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
- 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.

- 7. Add the Notification Group instead the plain Notification in the transition steps, as described above.
- 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)

9.2 Link Notifications in After Sales module

After Sales module has:

- two emails that are triggered from OSM,
 - Confirmed Customer: The email that a known customer receives when making a booking through OSM
 - Unconfirmed Customer: The email that a new customer receives when making a booking through OSM
- two emails that are triggered from Action Buttons
 - Offer Email: The Service Offer email that the service advisor can send to the customer
 - Offer Extension Email: The Service Offer Extension Email that the service advisor can send to the customer
- and currently two emails that are triggered from the Activities of the Action Container.
 - Activity: Confirmation of the order Outgoing email
 - Activity: Confirmation of the order Extension Outgoing email

In order to add the configured notification templates (paragraph 1-8) into the six different possible positions:

- 1. Search in the menu for the "Notification Template Group List". There you will find a list with all the notifications exist in your database, including the ones you made in step 8.2
- 2. Search in the menu for the "Setup" and open the Setup table
- 3. Search the word "JCEmail"
- 4. Six different Entity Keys should appear:
 - a. JCEmailOSMConfirmedCustomer
 - b. JCEmailOSMUnconfirmedCustomer
 - c. JCEmailOffer
 - d. JCEmailOrderExtOffer
 - e. JCEmailOfferConfirmed
 - f. JCEmailOrderExtOfferConfirmed



5. Edit each key and add the Code of the already made Notification Template Group into the field Entity Value. You can get this key from Step 1.

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à I		8D7E7829B90DCF8	JCEmailOSMConfirmedCustomer	AutoInsert	K5PWgYkIp02Vx_4nUXJapg	~	(R)	8D6C35FAAF2B3C6	8D6C35FAAF2B3C6	WhatsApp Message	~
>		8D7E173FF10E588	JCEmailOrderExtOfferConfirmed	AutoInsert	K5KAgsovRUm-N26uQnNqWA	~	\diamond	8D6E5E748254B60	8D6E5E748254B60	Thank You After Delivery	~
		8D7E236078C6D7F	JCEmailOSMUnconfirmedCustomer	AutoInsert	Zzaev_0g3kaHONiCf3JGCg	~	2	8D6E5E7CE63B307	8D6E5E7CE63B307	Delivery Reminder	~
2		8D7E16D8D0EF629	JCEmailOrderExtOffer	AutoInsert	5fAqaAFVN0OoU_HbEtwdug	~	C.	8D6DEC80C0C73C9	8D6DEC80C0C73C9	Email Ad Hoc	~
		8D7E214D17BBA15	JCEmailOfferConfirmed	AutoInsert	293DSRxbDEGoqLkDonE5mQ	~		8D73864DD175A70	8D73864DD175A70	User Notification	~
		8D7E1F421447BA0	<mark>JCEmail</mark> Offer	AutoInsert	t-lapv1QmkOxaHak3COF5A	~		Zzaev_0g3kaHONiCf3JGCg	Zzaev_0g3kaHONiCf3JGCg	Smart - Demo Appointment Service	~
								t-lapv1QmkOxaHak3COF5A	t-lapv1Qmk0xaHak3COF5A	Smart - <mark>Demo</mark> Service Offer	~
								293DSRxbDEGoqLkDonE5mQ	293DSRxbDEGoqLkDonE5mQ	Smart - Demo Service Offer Confirm	~
								SfAqaAFVN0OoU_HbEtwdug	5fAqaAFVN0OoU_HbEtwdug	Smart - <mark>Demo</mark> Order Ext Offer	~
								K5KAgsovRUm-N26uQnNqWA	K5KAgsovRUm-N26uQnNqWA	Smart - Demo Order Ext Confirmation	~
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9.3 Ad-Hoc Email

Ad-Hoc email is available through Action button within the Business partner or the Lead (Sales/Purchase).

To configure it, follow paragraph 1-8 to prepare the Notification and the Notification Templates. Then:

- 1. Search in the menu for the "Notification Template List". There you will find a list with all the notifications exist in your database, including the ones you made in step 8.2
- 2. Search in the menu for the "Setup" and open the Setup table
- 3. Search the word "EmailAdHoc"
- 4. At least these three Entity Keys should appear:
 - a. <u>EmailAdHocMasterTemplateName</u>: Add into the field Entity Value the code name of the Master template you want to use.
 - b. <u>EmailAdHocContentTemplateName</u>: Add into the field Entity Value the code name of the Content (Mail) template you want to use.
 - c. <u>EmailAdHocNotificationTempl</u>: Add into the field Entity Value the code name of the already made Notification Template Group from step 8.2.