

CRM – Creating a Web Document

Purpose: Web documents are individual web pages that can form a standalone website, or be added to your website for the duration of the dialog. Unlike an email document, where you enter your email text directly in the document, a web document is designed by first adding various document elements (such as paragraphs or questions) and then editing them as needed. The order of the items in the list determines their order in the web document.

Follow the instructions below to create a new web document
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Step	Action					
1.	In CRM, navigate to the Dialog Designer page. Select Main Menu > Marketing > Document Designer. <i>Note:</i> If you are in a Dialog Framework , you may also click the <i>Documents</i> tab. Favorites Main Menu > Marketing > Document Designer					
Document Designer Search Results						
	No results have been found or no search has been performed.					
	Add Web Document Add Email Document					
	Search Use Saved Search ▼					
	*SetID		UNICS	University of Northern Iowa		
	Document Name		-	-		
	Document Type Dialog Name					
	Created By					
	Date Created	>= •	31			
	Search Clear Bas	ic Search 🛛 🚪	Save Search Criteria 🗎	Delete Saved Search		
2.	Click the Add Web D	ocument b	utton.			
	Add Web Docume	nt				



Step	Action						
3.	 On the Document tab of the Document Designer, complete the following: Name – Enter as appropriate, must be unique. The double quote (") and period (.) characters are not allowed in the document name. Language Code – Defaults to <i>English</i> Attach to Dialog – If applicable, attach to appropriate dialog. Note: You can only attach a document to a single dialog. If you want to use the document with more than one dialog, you must clone the document. Long Description – Enter description Secured Document checkbox – Use if security required to access Survey Document - Select this check box if the document will contain survey questions that will be weighted for scoring purposes. SetID – Defaults to <i>UNICS</i> Title – Enter title for the web document 						
	Document Designer Marketing Center						
	Document						
	*Name Rachel_Test_Landing_Web_Page Type Web Doc *Language Code English						
	Survey Document Secured Document						
	Title Rachel's Test Landing Page Redirect URL						
	Redirect Delay Seconds						
4.	 Complete the rest of the <i>Document</i> tab: Layout (Template Name) – Select from existing layout templates Question Format section – Select as desired Answer Format section – Select as desired 						
	Layout						
	Template Name						
	Question Format Justify Left Field Font Size Normal						
	Indent 0 Font Color Black -						
	Font Type Arial Font Style Bold Italic						
	Answer Format						
	Justify Field Font Size Normal						
	Indent 0 Font Color Font Type Font Style Bold Italic						



Step	Action					
5.	Click the <i>Designer</i> tab. Select Elements to add.					
	Document Designer Marketing Center					
	Element Summary Element Detail					
	9 (+) 📅 + 🖬 🖾 📝 🐉 🦉 🚥 📼 🗮 🔝 🛄 🛄					
	No elements have been added.					
	L 🖉 Element Detail 🙄 Clone Element 🚀 Format Properties 🗍 Delete 🛛 Reorder					
	Save U Clone Q Search Add Web Document Top of Page					
6.	On the <i>Designer</i> tab, click the icon for the element you wish to add:					
0.	Shale 2 estanti ale, chek ale fesh for ale element you wish to add.					
	Element icon	Element Name	Description			
	Ч	Paragraph				
	<>	Custom HTML	Copy/paste any HTML code			
		Horizontal line				
	+	Blank line				
	<u>8</u>	Profile	Allows selection from CRM fields			
		Choose one				
	0100	Choose one with rating				
	2 2	Choose many				
	y n	Yes/No				
	abc	Text Entry	Inserts field for free text entry			
		Text Block Entry	ľ – – – – – – – – – – – – – – – – – – –			
	123	Number Entry	Inserts number field			
	.01	Decimal Entry	Inserts number field with decimal			
			value			
	31	Date Entry				
	<u>(</u>	Time Entry				
	e P	Upload File				
		Button	Inserts customizable action button.			
			Example: Submit			
			400 elements, including profile elements than 400, an error message will display.			
7.	Click the <i>Marketing Center</i> tab. Select or add a Marketing Center if appropriate.					
8.	Click the Save button.					
9.	Use the Preview link Review at the top to view the email.					



Appendix A – Types of Document Elements

Field	Description/Action
Paragraph	Text that is displayed in the web document. Used as: headings or
	paragraphs of descriptive text in a document.
Choice Question	A multiple-choice question where the respondent chooses from the
	choices listed. Online Marketing has four types of choice questions:
	Choose one, Choose one (w/rating), Choose many, and Yes/No.
Entry Question	A question where the respondent enters text or numeric information.
	Online Marketing has seven types of entry questions for Text Entry,
	Number Entry, Decimal Entry, Date Entry, Time Entry, Text Block
	Entry and File Entry.
Button	A button that the respondent can use to submit and/or clear the
	information entered on the web document.
Horizontal Line	A ruling line used to separate different parts of the document.
Blank Line	A blank line (like those that appear between paragraphs) between
	two elements.
Custom HTML	Custom HTML code. Text entered in a Custom HTML field is
	treated just like any other HTML code by the browser; no
	processing is done by Online Marketing.