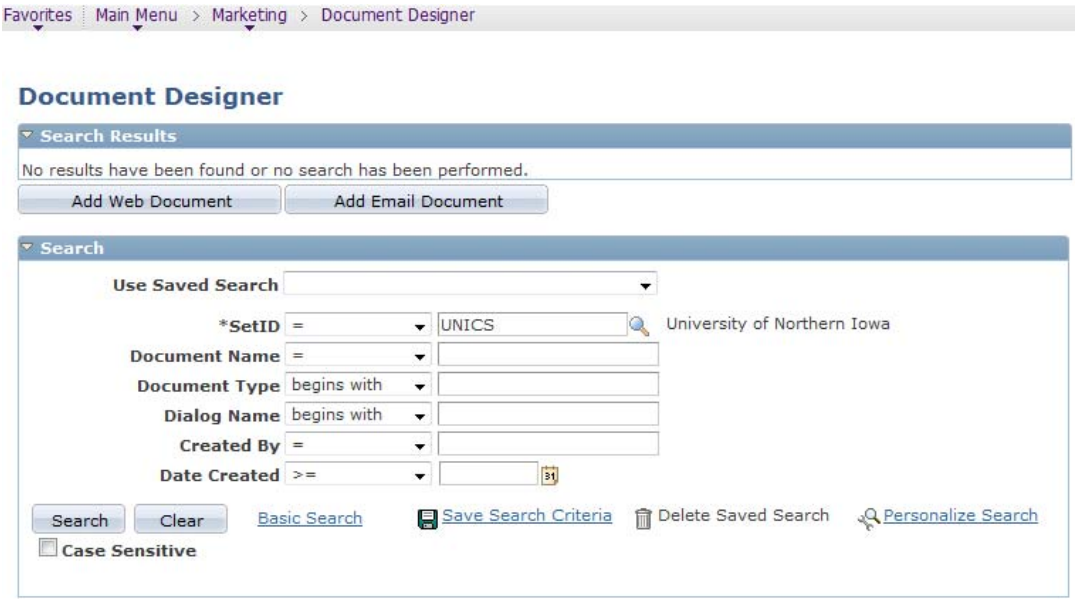
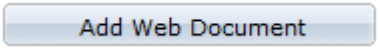
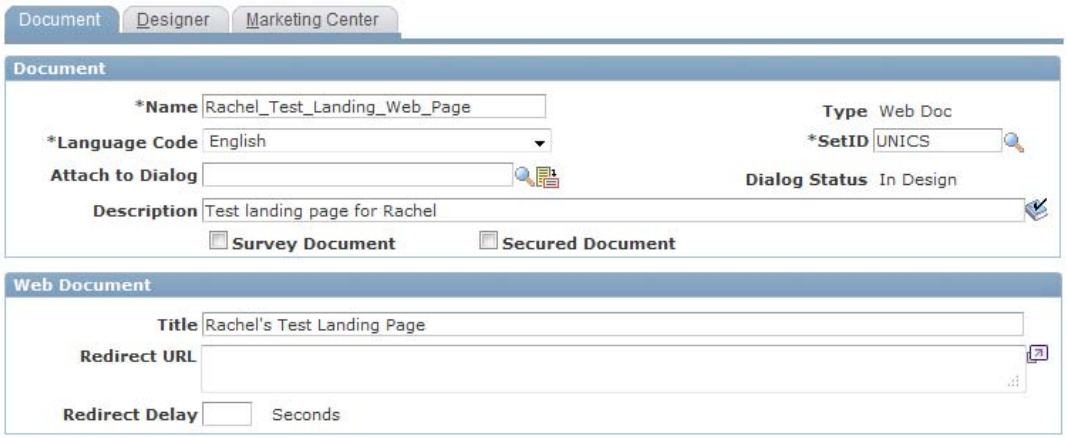
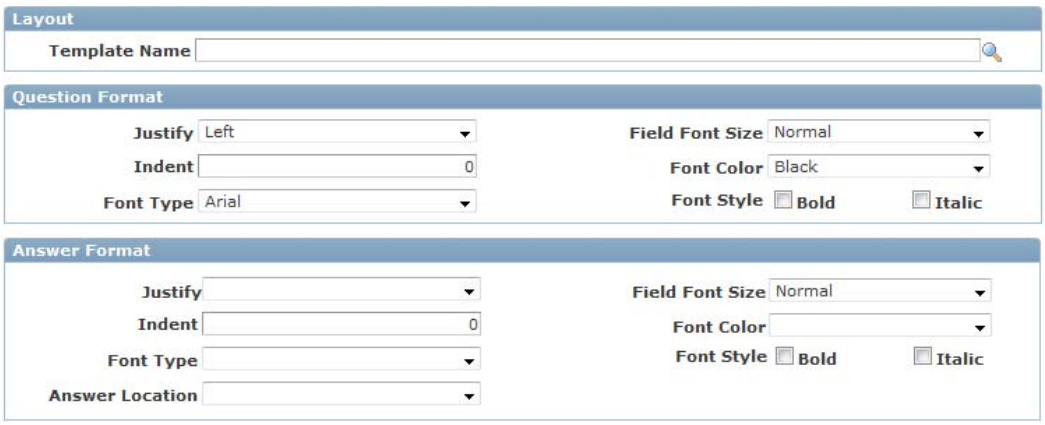
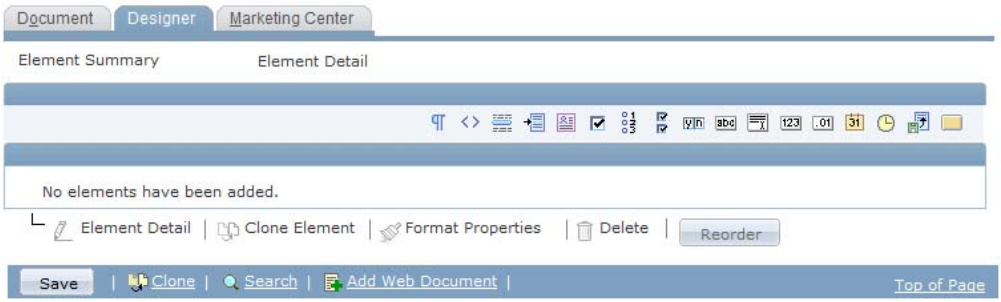
CRM – Creating a Web Document

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.

Step	Action
1.	In CRM, navigate to the **Dialog Designer** page. Select **Main Menu › Marketing › Document Designer.** ***Note:*** If you are in a **Dialog Framework,** you may also click the ***Documents*** tab. 
2.	Click the **Add Web Document** button. 

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 *English* • **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 *UNICS* • **Title –** Enter title for the web document 
4.	Complete the rest of the ***Document*** tab: • Layout (Template Name) – Select from existing layout templates • Question Format section – Select as desired • Answer Format section – Select as desired 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Click the Designer tab. Select Elements to add.
 
</td></tr>
<tr><td>6.</td><td>On the Designer tab, click the icon for the element you wish to add:

<table>
<tr><th>Element icon</th><th>Element Name</th><th>Description</th></tr>
<tr><td></td><td>Paragraph</td><td></td></tr>
<tr><td></td><td>Custom HTML</td><td>Copy/paste any HTML code</td></tr>
<tr><td></td><td>Horizontal line</td><td></td></tr>
<tr><td></td><td>Blank line</td><td></td></tr>
<tr><td></td><td>Profile</td><td>Allows selection from CRM fields</td></tr>
<tr><td></td><td>Choose one</td><td></td></tr>
<tr><td></td><td>Choose one with rating</td><td></td></tr>
<tr><td></td><td>Choose many</td><td></td></tr>
<tr><td></td><td>Yes/No</td><td></td></tr>
<tr><td></td><td>Text Entry</td><td>Inserts field for free text entry</td></tr>
<tr><td></td><td>Text Block Entry</td><td></td></tr>
<tr><td></td><td>Number Entry</td><td>Inserts number field</td></tr>
<tr><td></td><td>Decimal Entry</td><td>Inserts number field with decimal value</td></tr>
<tr><td></td><td>Date Entry</td><td></td></tr>
<tr><td></td><td>Time Entry</td><td></td></tr>
<tr><td></td><td>Upload File</td><td></td></tr>
<tr><td></td><td>Button</td><td>Inserts customizable action button. Example: Submit</td></tr>
</table>

Note: Document can contain a maximum of 400 elements, including profile elements (profile questions). If you attempt to add more than 400, an error message will display.</td></tr>
<tr><td>7.</td><td>Click the Marketing Center tab. Select or add a Marketing Center if appropriate.</td></tr>
<tr><td>8.</td><td>Click the Save button.</td></tr>
<tr><td>9.</td><td>Use the Preview link

at the top to view the email.</td></tr>
</table>

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.