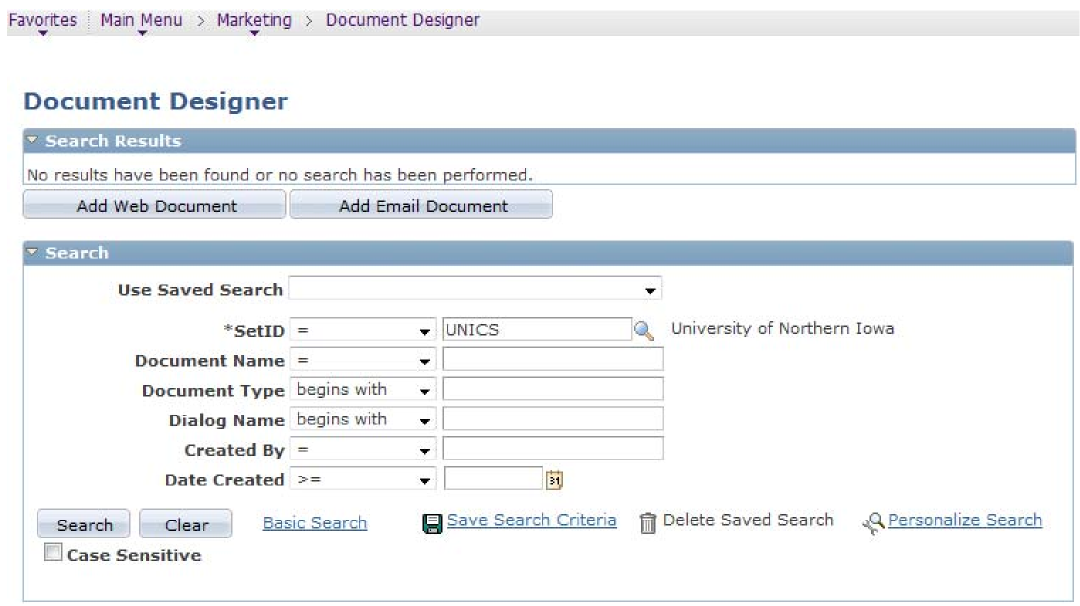
CRM – Creating an Email Document

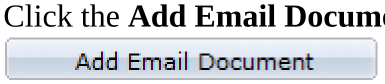
Purpose: Email documents are used to communicate with the target audience during the dialog. Email documents can be initial offers that you broadcast to a target audience, or follow-up emails that you send after people respond. You can personalize email documents for each recipient by adding the recipient's name and other information from the database. (This is similar to performing a mail merge in a word processing application.)

Follow the instructions below to create a new email document.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>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.



</td></tr>
<tr><td>2.</td><td>Click the Add Email Document button.

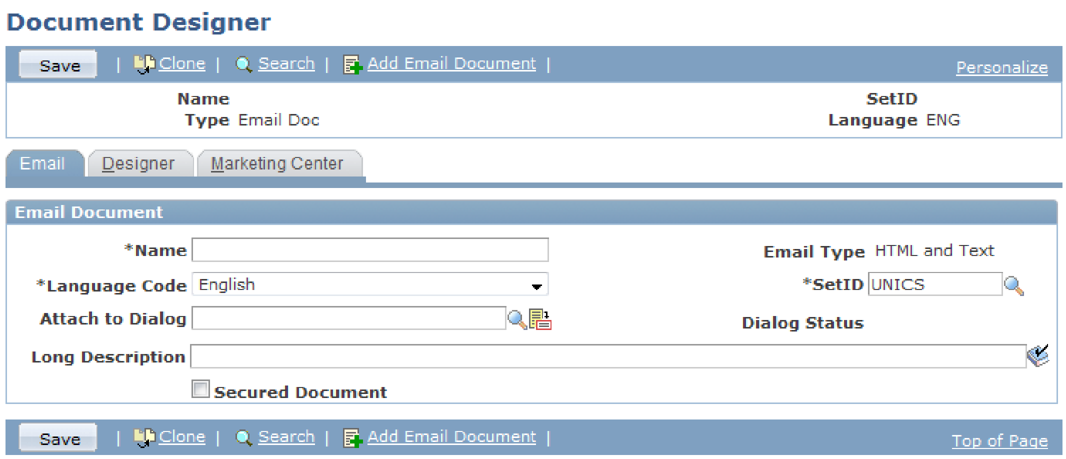


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3.</td><td>

On the Email tab of the Document Designer, complete the following:

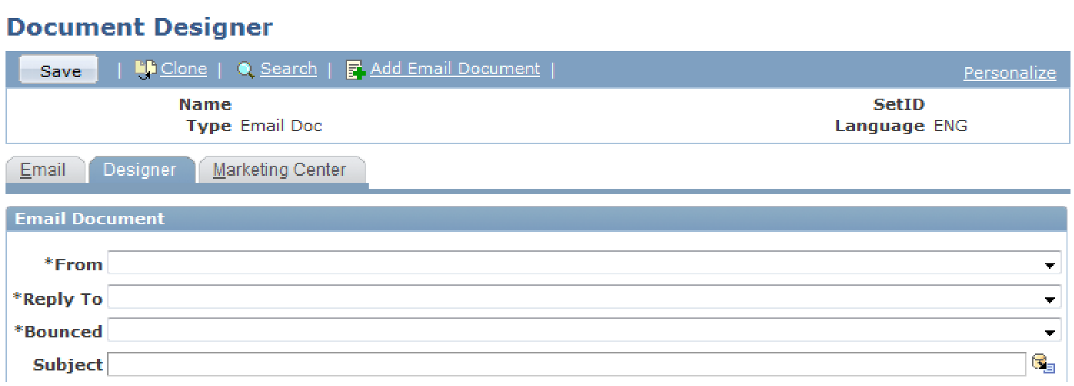
- **Name** – Enter as appropriate, must be unique
- **Language Code** – Defaults to *English*
- **Attach to Dialog** – If applicable, attach to appropriate dialog. **Note:** You can only attach a document to a single dialog. If you want to use the document with more than one dialog, you must clone the document.
- **Long Description** – Enter description
- **Secured Document checkbox** – Use if security required to access
- **SetID** – Defaults to *UNICS*



</td></tr>
<tr><td>4.</td><td>

Click the ***Designer*** tab. Complete the following:

- **From –** Originator's email
- **Reply to –** Email where replies are sent
- **Bounced –** Email where all bounced emails are sent
- **Subject –** Enter as appropriate, character limit is 254.



Warning! Be careful not to use a person's email address for any of these mailboxes, due to the potential number of emails that can return to these addresses.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>On the Designer tab, create the email body.
<table>
<tr><th>If you wish to…</th><th>Then…</th></tr>
<tr><td>Insert a merge field</td><td>Add curly braces {}
Click the Merge button
Select the Merge tag
Select the Content (see Appendix A for descriptions)
Click the OK button.</td></tr>
<tr><td>Add HTML content</td><td>Copy/paste the desired HTML
Or use the Import HTML button to add an existing HTML file you have saved
Click the Save button
See “HTML Tips” for more details on entering HTML information.</td></tr>
<tr><td>Enter Text information</td><td>Click the Text tab
Enter plain text or use the Import Text button to add text from an external source
Click the Save button</td></tr>
<tr><td>Enter multi-part MIME (both text and HTML) information</td><td>To create a multi-part MIME document, simply enter text in both the HTML and Text sections of the email body and save the document.</td></tr>
</table></td></tr>
<tr><td>6.</td><td>Click the Marketing Center tab. Select or add a Marketing Center if appropriate.</td></tr>
<tr><td>7.</td><td>Click the Save button.</td></tr>
<tr><td>8.</td><td>Use the Preview link Preview at the top to view the email.</td></tr>
</table>

Appendix A – Merge Content Fields

Field	Description/Action
Profile Fields (database fields)	Expand the *Profile Fields* folder. Expand the *Individuals* folder. Click the category you wish to open. Click the **Apply** button next to the field you want to merge. For example, if you want to personalize an email to a respondent's first name, you can select **Individuals> People>First Name** for the merge content. Sample of applied tag: **Dear** <pstag:profile value="Individuals.People.First Name" />
Web Link	Enter the web link information, including name, format, label, type, tracking, and category. Click the **Apply** button.
Dynamic Content	
Current Date	Select a date format from the available options and click **Apply**.
Current Time	Select a time format from the available options and click **Apply**.
Recipient ID	The ID that is assigned to each person in the database. You cannot make changes to this value.
Tracking Number	A code used to identify the respondent, the action, and the target audience. You cannot make changes to this value.
Extensions	Extension are custom content and custom actions.