Easily to use and adapt correspondence template

The creation and editing of correspondences offers new and simplified possibilities in customer communication with the current version from 7.5 of PiSA sales.

- New correspondence template type for creating formatted serial and individual e-mails with placeholders for personalization.
- Simplified correspondence template management for end users.
- Saving, marking templates as favorite and structured filing of templates (by scope/topic).

With the new features and functions, you as an end user can use templates relatively uncomplicated and even adapt them. The new PiSA sales HTM editor also helps to do this.

Tip 1:
Use an e-mail or serial e-mail that is already close to your ideas, save it with the used PiSA sales HTM template (only this can be saved) and adapt it to your needs. For this, use the wizard "Save template", at the e-mail and the template management.

Tip 2:
In the simplified template management, copy an existing template, customize it and select the new template from the template selection at the activity (e.g. e-mail).

Tip 3:
Use a PiSA sales HTM template and in the PiSA sales HTM editor place the placeholders for salutation, signature etc. Between place the text and graphics. Select the new template from the template selection at the activity (e.g. e-mail).

Tip 4:
Classify templates by topic and scope and mark the template as a favorite to quickly find it in the template selector.

Tip 5:
"Save as template" is also available on letters/faxes, but is only possible for letters/faxes based on a Word mail merge template.

Use an existing template

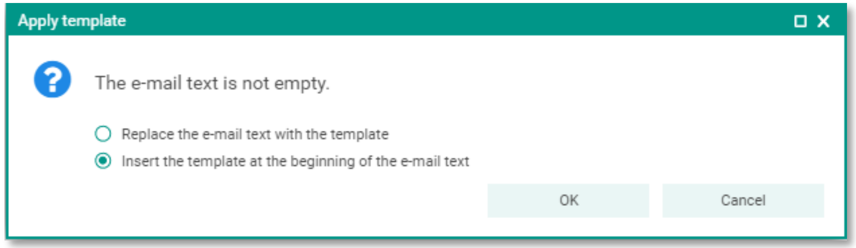
Once you create an e-mail, for example, a template is usually used automatically and the editor field is filled in automatically.

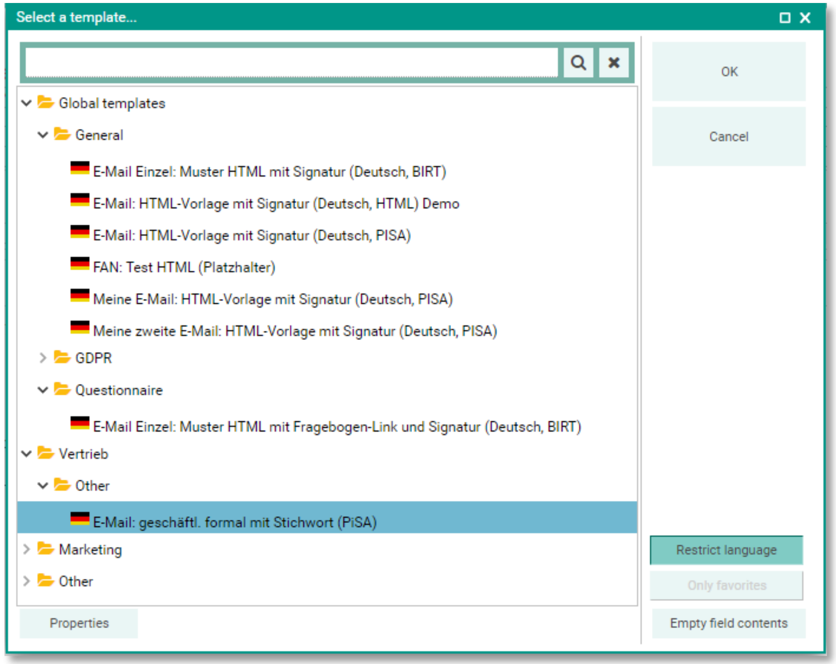
In "My Data" you may even have set a preferred correspondence template that is always automatically drawn when you create a correspondence.

So you can exchange the just drawn template for another suitable template, which usually overwrites the existing text. However, the system automatically offers alternatives once another template is to be selected via the "Template ..." button.

Attention.

These alternatives do not come when selecting a template via the dropdown selector.





After OK, the structured template selection opens in the tree view, classified by scope and topic and, if necessary, restriction to favorites, language (you manage classification and favorites when saving as a template or in the template management).

Depending on the decision, the content of the new template will be inserted in the text field.

Template-based reply/forward

By the way, in this way you can also use a template for your reply e-mail with "Reply" or "Forward" and insert its content before the original text. For this, when selecting a template at the reply via the button "Template ..." also appears the corresponding message.

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Save mail, letter or fax as template

With the "Save as template" wizard, existing e-mail texts can be saved as a template for later use. This is useful, for example, if a mailing is to be modified slightly or reused on a later date (event invitation, info about new products, etc.) or if you simply want to use an individualized e-mail template.

Attention.
Saving as a template is only possible for e-mail texts based on the new PiSA sales HTM template.
You can save a template from e-mails that have not yet been sent.
But from already sent e-mails only if they were sent with "Send directly" from PiSA sales and not via groupware.

Saving to letter/fax is only possible for letters/faxes based on a Word mail merge template.

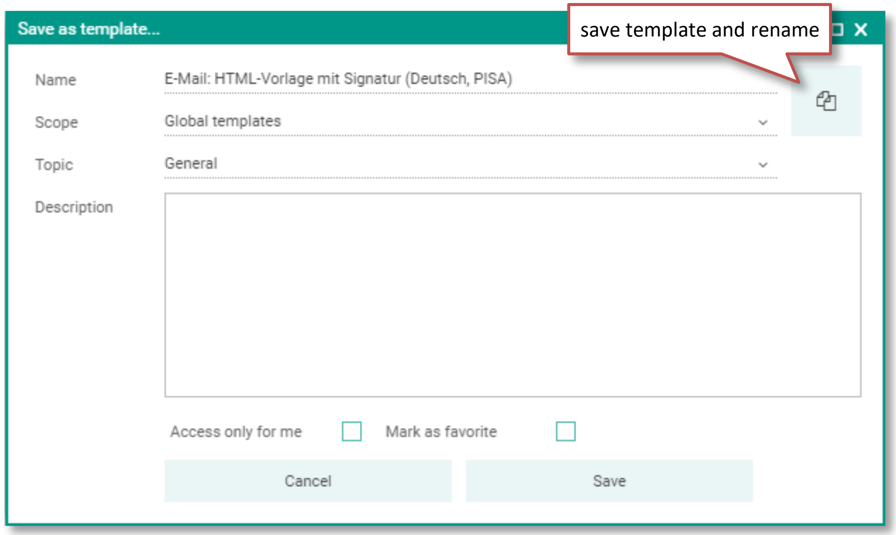
With the function "Save as template" they open the wizard, which offers the following options:

- “Create new template” button (copy template in wizard, adjust name and save as new template).

It is always best to rename the template right away!

When naming the template, it is helpful to use a name that helps to clarify the purpose of the template and thus to be able to clearly assign it in the template selection.

- Classification of the template according to scope and topic as well as marking as "Favorite" for fast retrieval in the template selection



Control access to the template - "Access only for me".

- Checkbox active = template receives the status "in development" internally. Therefore, you can modify and test the template later.
- Checkbox empty = access for my department. The template gets the status "Released" and is at first provided unchanged. With the automatically set record access (Own company), anyone can use the template.

If you have saved an HTM template as a new template, you can customize it or edit the content in the "Template Management".

Edit template as non-template administrator

Note: *Non-template administrators do* *<u>not</u>* *have administrator rights (no cubes administrator, no administrator flag) and do* *<u>not</u>* *have the "Template and report administrators" profile. Only under this condition the simplified template administration view will be opened.*

All non-template administrators (end users such as secretarial, accounting dept., etc.) have a simplified view of template management. The simplified form contains only correspondence templates and offers the following options:

- Find templates easily (tree/list view, search, various quick filters)
- View templates (with type-dependent representation)
- Copy and delete templates (if access allows)
- Edit templates
- Classify templates
- Set access for me or for department
- Mark templates as favorites

Attention. Never *change the original template, but always create a copy for your correspondences. Be careful NOT to change the fields or placeholders in the template at first, and it is best to edit only text modules. It is sometimes important not to change the syntax in the template unless you explicitly intend to do so. Specially trained report developers are responsible for complex template creation in your company.*

If you as an end user have appropriate access rights to a template, you can edit it in the template management. E.g. you have already saved a template from an e-mail (PiSA-HTM template only).

How to open a template?

Option A:
Go to the Sales/Backoffice/Templates menu and search for the appropriate template. Use the search field or the available quick filters.

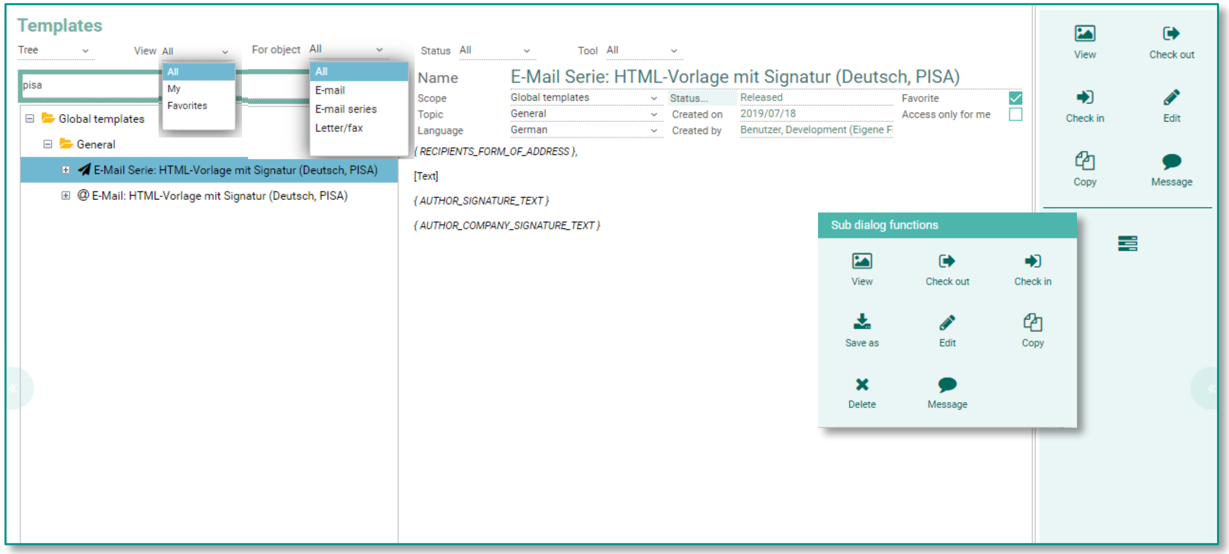
Option B:
Open the template from the hyperlink field, e.g. at an e-mail, and thus jump directly to the template management.

How do you edit a template?

- Mark the corresponding template in the tree on the left and check the text structure on the right.
- If necessary, click "Copy" in the toolbar to make it your own template.

Important! *Rename the template immediately when copying, otherwise it may be very difficult to find it again after saving!*

- After renaming, select "Save and Open".
- Maintain the classification attributes and set "Access only for me" if necessary, so that they can further edit the copy.
- Locate the copy on the left in the search box (tree), highlight it, and click Edit in the toolbar.



How to work with the HTML-Editor, please read in the online help in chapter "How to use PiSA sales" -> HTM-Editor -Fields with freely formatted text-.

For example, see below -> Creating a serial e-mail template with placeholders, from "Working in the HTM Editor".

New correspondence template type -PISA-

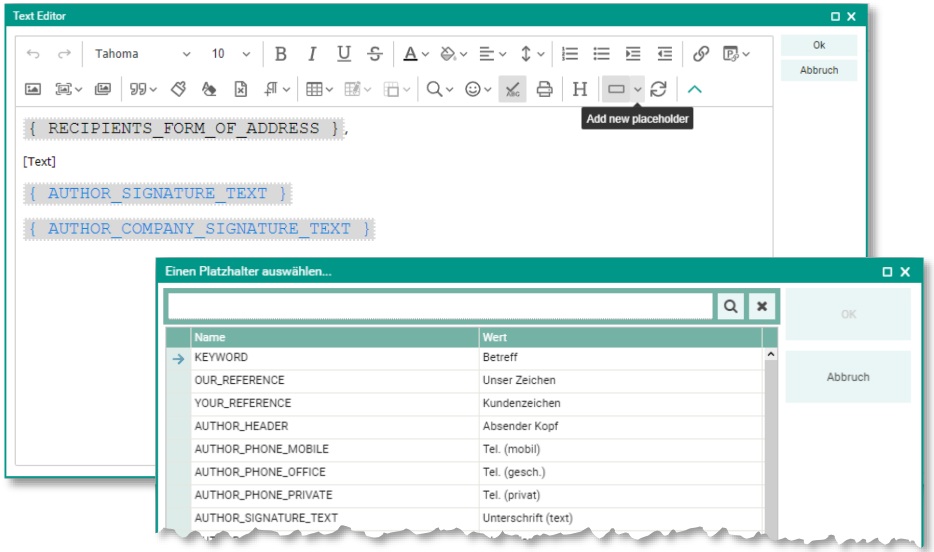
You should already know how to use templates, save texts as templates and adapt them.

PiSA sales provides a new correspondence template type (Tool=PISA) to use for serial and individual e-mails.

In the standard you will find "E-Mail Series: HTML Template with Signature (German, PISA)" and "E-Mail: HTML Template with Signature (German, PISA)".

The templates bring along various placeholders via the Loader, which can be selected and inserted into the e-mail text via a function in the toolbar of the new editor when creating an e-mail. The placeholder function can be found in the Full mode of the HTM editor.

With a toggle switch, you can switch between placeholder mode and data mode in the editor for checking. This allows you to see immediately whether the correct data is being inserted.



- The placeholder functions are only available on serial and individual e-mail, not in other activities.
- Placeholder functions are only available on e-mails with HTM template. If a non-HTM template (BIRT, WWD) is selected, they are disabled.
- Placeholders are supplied exclusively with data from the referenced field. No downstream logic can be executed.
- In single e-mails, only the use of placeholders makes sense, that reference 1:1-linked data, e.g. project subject, project number, etc. In placeholders that are fed from linked lists, such as RECIPIENT_..., only one(!) recipient is drawn/entered.

Important! *Only the placeholders that also contain data are displayed. If, for example, the automatic creation of a signature is not defined in "My data", then the placeholder [AUTHOR_SIGNATURE_TEXT] is also not displayed for it.*

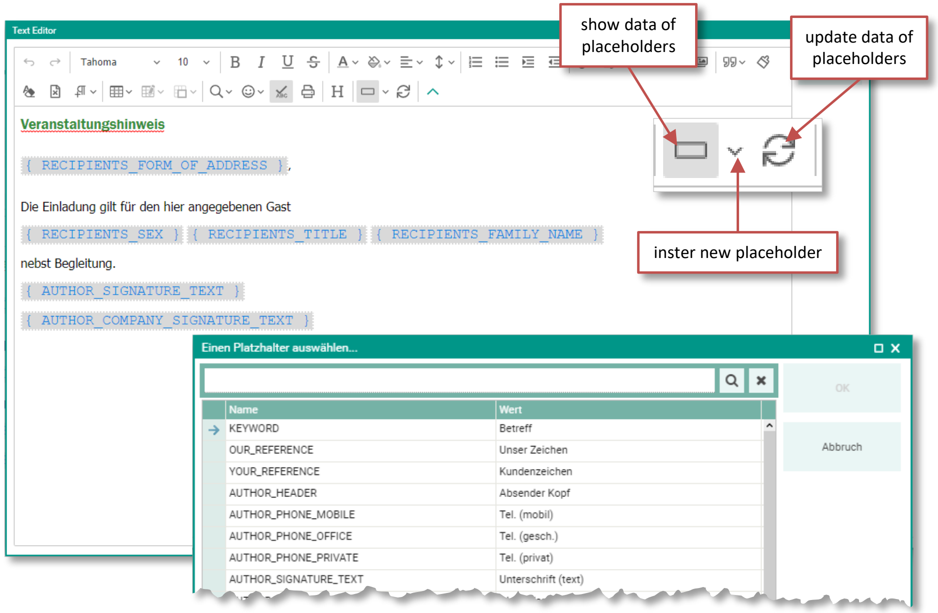
Create and save a series e-mail template with placeholders

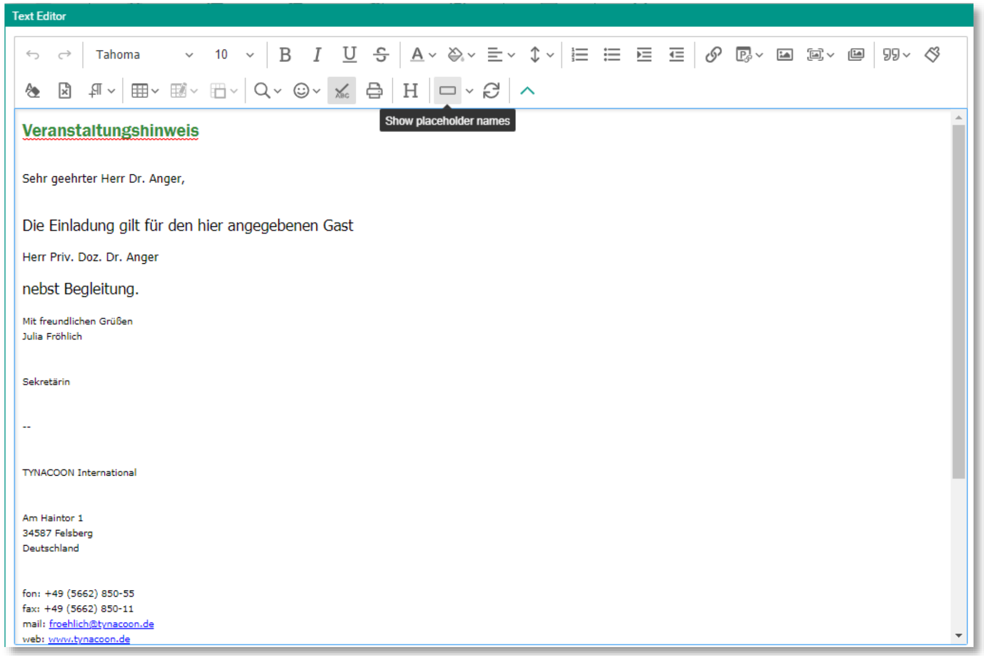
You don't necessarily have to work in the template management if you can "tinker" with a template yourself directly in the editor on a serial e-mail.

- Create a new "Outgoing serial e-mail" (Marketing/ Serial e-mail)
- Enter at least one "recipient" and switch to the "HTML text" tab.
- Use the "Template ..." button to select the new series e-mail template "E-mail Series: HTML Template with Signature (German, PISA)".

Working in the HTM editor - full mode

- Position the existing placeholders with paragraphs if necessary and edit any text.
- Click the editor in full mode [F2] to use the placeholder functions.
- Place the cursor at the approximate position for the placeholder, and first position each required placeholder individually.
- Check the data in the placeholders using the "Show placeholder data" function. If necessary, you must execute the "Update placeholder data" function.





- It is best to stay in the full mode of the editor and format text and placeholders for a harmonious layout (font, font size, etc.).
- Click OK and save the serial e-mail.

Send test

With serial e-mails it is not possible to simply see the result, because as is known, a serial e-mail is to be generated only when it is sent.

If you have edited the serial e-mail template, then click the “Send Test” function to send the draft serial e-mail to a contact for review. Select a respective test recipient from the system (including yourself, for example) so that you can check the e-mail in your groupware. This will initially send the content only to this e-mail address and not as a serial e-mail to all recipients.

If you are satisfied with the result, then you can save the content of this serial e-mail as a template -> [Save mail, letter or fax as template.]

Now you can share this template with other users in the template management and use it in other serial e-mails as well.

If you want to customize a serial e-mail template independently from a created serial e-mail directly in the template administration, please see above -> [Edit template as non-template administrator.]