

GUIDE KSL EMAIL DESIGNER

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1. KSL Email Designer



KSL Email Designer is provided as a standalone product to manage email communications. KSL Email Designer is also provided as an optional module of KSL Suite and KSL for Salesforce.



Please refer to the KSL for Salesforce documentation for implementing emails and emailings with Salesforce.

1.1. Email, communication & KSL

Email is an alternative and complement of mail channel which allows to cover several types of communications, sent by the different departments of a company to target customers and prospects.

For marketing & communication departments, the mass-emailing (also called emailing) allows to deliver:

- newsletters, information letters sent periodically,
- invitations to an event,
- marketing messages and targeted outbound communication

This communication is generally a part of a marketing strategy to sell, to prospect or simply to retain customers.



These emails can also be involved in a multichannel scenario driven by customer data: in this context, business data is sent to KSL to create the communications corresponding to the appropriate channel and to send them.

For a customer management department, email allows to rapidly exchange with customers. In this context, communication are either single transactional email to a single recipient or emailings to a list of recipients. In this case, email allows to deliver:

- order and payment confirmation, account activation, response to a client,
- information sent to a client to inform him that his invoice, his statement or his contract is available in his web account,
- automatic payment reminders,
- Etc.



Email is also a fast and efficient internal communication medium, usable to communicate with all employees and departments in a company.



More than half of the emails are now read on adaptive and mobile media.

It is therefore essential to optimize emails, for a readable and pleasant content on screens of any sizes... or lose half of the readers.

KSL Email Designer is positioned as a centralized collaborative platform. It provides a tool to delegate and share the email and campaign management to the different department of a company.

KSL Email Designer offers companies the ability to implement a collaborative and controlled organization for email communications:

- Centralized content management: creation of paragraphs and images used by emails
- Centralized template management: e.g. marketing and document production teams can create and share email templates
- Delegation of the creation of personalized emails: departments, commercial teams and assistance teams can autonomously create, test and launch emails and emailings, in using emails validated by the marketing department
- Centralized email delivery for a global, automated and recurrent communication

Ksl is positioned to create responsive emails on these multiple uses, taking advantage of a transverse environment, as much for its shareable resources as for its industrialized production and delivery processes.

1.2. KSL Email Designer, an All-In-One tool

This guide describes the use of KSL Office application in the context of KSL Email Designer.



KSL Email Designer is the KSL email management function and product and is based on:

- a repository sharing all the resources: style sheets, images, graphical blocks, personalizable templates and hyperlinks,
- the KSL Office application, a portal to manage the repository,
- the KSL Interactive application for creating email templates and for personalizing email before delivery.

These three elements allow a quick and intuitive implementation of KSL Email Designer and provide a

solution for communication and marketing professionals, but also for business teams and business experts.

1.3. In 3 steps, 3 actions: assemble, personalize, deliver!

All can be done in 3 steps:

- Assemble predefined graphics blocks or use a custom template of the library.
- Enrich, personalize and add variables to email in respecting the graphic rules of the company.
- Visualize and transmit the preview for validation, then deliver the email or emailing campaign.

Get started, we accompany you on every step!

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Unless otherwise stated, the companies, names and data used in our examples are fictitious ; any reconciliation with real companies or entities would be the result of coincidence.

Typographic conventions

<i>Text file sample</i>	Code example or file settings
	Note, information
 Chapter, Guide	Reference to another guide or chapter
<i>Example</i>	Example, variable, code extract
Keyword, label	Keyword, application label, important item

Contact Naelan

Headquarter - 4 rue Claude Chappe
69370 Saint-Didier au Mont d'Or France
+33 4 37 59 81 40

www.naelan.com
support@naelan.com

Office in Paris - 4 Place Louis Armand
75023 Paris France
+33 1 72 76 80 67

contact@naelan.com

2. The guide of responsive email

The "responsive" behavior is the techniques used in order for an email (or a website) to adapt its form to be read on any device, from the XL screen of the desktop to that XS screen of a smartphone.

It preserves the visual and understanding of the message by rearranging the design of the initial communication via programmed automatism: image zoom, serialized or parallelized information blocks, among others.

Email Responsive
BY KSL SUITE... A CONSOMMER SANS MODERATION

Corine, le saviez-vous ?

Le comportement "responsive" est l'art et la manière, pour un email, de s'adapter à n'importe quel média de lecture, de l'écran XL, posé sur votre bureau à celui de votre smartphone.

L'emailing Ksl Suite préserve, telle une espèce en voie de disparition, la clarté, le visuel et, par conséquent, la compréhension du message, pour inciter le destinataire à la lecture.

Vous me saluez ?

Email Responsive
ET VOUS, A VOUS EN SUEZ ?

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Vous me saluez ?

Qu'est-ce que le "design adaptatif" ?

Techniquement, il s'agit d'automatismes programmés, appliqués au design de la communication initiale pour s'adapter à la taille de l'écran de lecture : zoom sur les images, zoom ou bascule des blocs d'information, entre autres...

Le design adaptatif doit également respecter certaines règles pour ne pas fâcher les navigateurs et autres boîtes de réception.

Objectif : rester beau en toute circonstance !

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Objectif : rester beau en toute circonstance !

KSL OFFICE

Tout-en-un dans KSL Office

L'emailing s'appuie sur le référentiel qui partage toutes les ressources évolutives (images, blocs graphiques, modèles personnalisés), et sur le document interactif pour la modélisation de l'email.

COMMUNICATION

Une solution pour les pros

...pour les professionnels du marketing et de la communication, pour les commerciaux et les experts métier. Avec une mise en œuvre intuitive et rapide, l'emailing devient une véritable brique de communication.

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En 3 temps, 3 mouvements !

Assemblez

...des blocs graphiques ou chargez un des modèles personnalisés de votre bibliothèque.

Personnalisez

Enrichissez et variablez votre email avec pour seule contrainte votre charte graphique.

Diffusez

Partagez votre BAT pour validation et lancez votre campagne emailing marketing.

2.1. Responsive email is not a printable document

Responsive email and mail are two forms of communication that differ on their form and objectives. Therefore, it is often difficult to share complex KSL components like groups of text zones and text zones including tables.

However, some components can be shared by mails and emails

- Style sheets
- Pictures and photos
- Simple text zones, without tables, associated with a style sheet component

2.2. Basic rules

The basic rules to create a communication by email are:

- Create an interesting or appealing visual, whose organization is adapted to the smallest screens = "mobile first"
- Create real interactivity, easy-to-operate links and buttons regardless of the reading device
- Use character fonts and images adapted to the "responsive" mode
- Create a synthetic and quickly read content to facilitate reading

2.3. Recommendations for responding to device constraints

The tips below will allow email to be open and read in the best conditions on a large number of browsers and devices.

- A responsive email template has an optimal width that is between 500 and 650 pixels, to avoid a reader to use the horizontal scrollbar (in addition to the vertical scrollbar!) on his mobile.
- Use standard fonts: Times and Georgia for fonts to serifs, Arial, Helvetica, Sans-Serif, Trebuchet, Tahoma, Verdana, Impact (and some other variations) for proportional fonts without serifs, mail for non-proportional fonts (to monospaced fixed font).
- Prefer a font size of 14px for the body of mail, for an optimal readability.
- Concerning a columned presentation of content, an information block on 2 columns is ideal. It is also common to find a layout on 3 columns, with a maximum 4 columns.
- Anticipate the reading order for the information blocks, which will be presented in Z on the smallest media (see illustration above).
- Avoid superposing an important message on an image or a background frame (white message on a dark background for example) or including it in the image. Some email clients systematically block images (background and other), and propose to the user to download them... or not.

2.4. A direct impact on the resource creation, available in KSL

- A simplified style sheet, adapted and dedicated to email. This component is built from corporate design rules, but it is often necessary to change the character fonts and their size.
- Some text zones scaled for emails, with a layout of 600 pixels (format B5 for example), without any margin.
- Tables systematically with 1 to 4 columns, for every graphical blocks and personalized templates.

3. Ksl Email Designer

KSL Email Designer comes with a KSL project sample that contains the key elements to implement the solution in a company. This project is designed to be customized to meet all the needs.

3.1. The content of the project

KSL Email Designer is a function which requires a license. The project and its specific services are provided to customer which wants to install it for test or with its KSL Email Designer license.

The KSL Email Designer package is an independent project "EMAILING" which can be modified:

- A complete project environment:
 - A classification tree for components and services
 - Basic rights: two groups, EMAIL_ADMIN and EMAIL_USER, and different rights on components and services
 - Two profiles: Emailing_Admin and Emailing_User, to target the different KSL Office views
- Some directly usable components:
 - a style sheet "FS_EMAILING" dedicated to email
 - a ksl font component (for character fonts)
 - a library of graphical blocks ready to be assembled for creating templates
 - a library of personalized blocks as an example
 - some plug'n play personalized templates for example
- A service for creating and personalizing emails: "MaquetteEmailing_500px"
- A service for creating and previewing email bodies: "BuildResponsiveEmail"
- A set of actions (and associated services) available for the design of emailing
- A validation workflow with its actions et associated services
- A set of actions (and services) available on the archived emailing campaign

3.2. A project integrated to an existing project or an independent project?

It is possible to use emailing in an independent project of the KSL repository, with its own resources; the project will have its dedicated options; in this case, the default EMAILING project provided can be used as a plug'n play project:

- Import the EMAILING project
- Create two users (admin and user) and insert them in the default groups
- The default actions will be available without any settings

If it is necessary to integrate the KSL Email Designer function to an existing project:

- Select the Import/Export then Import menu
- Select the EMAILING project by selecting ? for the Import file or directory name field then click the *Next* button
- Choose a *Full import* and specify the following parameter fields:
 - Project name: select the project where integrating the EMAILING project

- Verify that Suppress objects that are not in imported project is not selected.
- Check the Import permissions and add to existing permissions option for groups is checked
- Verify that the Import Office profiles is not checked
- Adapt manually the storage map branches of the EMAILING project to the classification of the project and the Office profile of the project



Important notes:

- If some rules exist for text zones in the target project, do not import rules; adapt if necessary manually the rules and rights.
- If some Office profiles already exist that need integrating emailing function, only add the emailing dedicated view to the profiles thanks to the Ksl Office Setup > Office profiles menu of KSL Admin.

In the two cases, a minimum step of configuration will be necessary to adapt the standard emailing project to the context.

3.3. Setting the environment

KSL Style sheet and Fonts

The default style sheet is shared by a set of resources of the emailing project. It is possible to modify them in order to respect the different corporate styles rules via Ksl Studio or KSL Office.




Several style sheets can be managed in a KSL Email Designer project, which is very useful in the multi-brands/languages contexts.

It is also possible to add the styles and patterns of the emailing project to an existing style sheet component; but in this case, change in Ksl Office the style sheet of all the graphical modules and the style sheet used by the edition/template "MaquetteEmailing_500px" in Ksl Studio.



Attention:

- If a style sheet is linked to the email components, be careful that the styles are interpreted by most of the browser -  chapter 2.
- the character fonts used by the style sheet, and potentially usable by responsive emails, must be present and have a mapping in Ksl Font (KSL Font is managed in KSL Studio only).

- Several style sheets can be managed in the project, but it is recommended to have the same style sheets for all the components used by an email or an emailing: indeed, if a style sheet is defined when creating an email, and if the styles used in each component have no consistency with the style sheet, the production of the email will be stopped and in error.

The "project" settings

The Emailing project can be configured in Ksl Admin by selecting the Emailing project in the menu Projects > Project List.

When setting up the project as an autonomous project, the default settings for the new components are:

This formatting is fully adapted to the creation of new components dedicated to responsive email.

The classification tree

The classification of components and services of the project can be defined in the menu Storage maps > Components of Ksl Admin.

These classification trees are dedicated to components and services. Archived documents share a different classification tree.

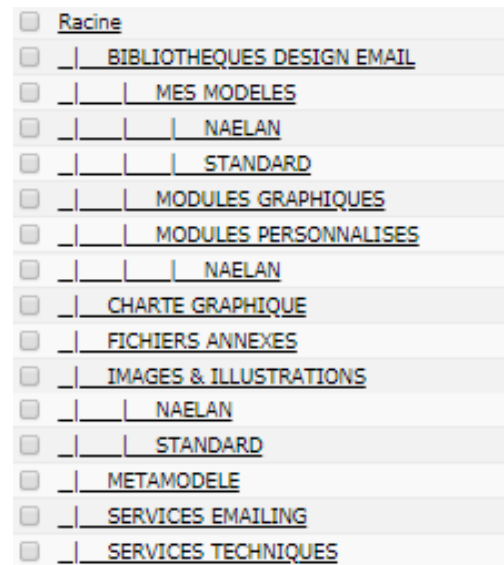
The branch "BIBLIOTHEQUE DESIGN EMAIL" (in English email library) contains all the resources needed for a fast design of an email: graphic or custom blocks, custom templates (groups and text zones).

The branch "CHARTRE GRAPHIQUE" (in English Style Rules) contains the style sheets.

The branch "FICHIERS ANNEXES" (in English Annexes Files) contains the file defining the shared hyperlinks and data dictionary for Salesforce.

The branch "IMAGES & ILLUSTRATION" contains the graphic images and illustrations used in the blocks and models of the project.


The last last branches contain the different production services.




The user groups

In the menu Permissions > Groups in Ksl Admin:

- The group EMAIL_USER (or users) corresponds to document/email designers. These users create their emailing, test it and send thme in a validation workflow, before sending the campaign to customers.
- The group EMAIL_VALIDATOR (or validators) corresponds to the users who validate the user's emailing; they also have the ability to modify the content directly.
- The group EMAIL_ADMIN (or administrators) corresponds to resource managers. They control the end-to-end emailing process (preview, test, campaign launch and archiving) from the design interface. In addition, they have control over the management of all production resources: access to image libraries, email templates, email blocks, test files, etc.

 Notes concerning user groups:

- Include users to these groups for an implicit implementation of the permissions described in this chapter.
- These groups can correspond to the groups or roles of the user directory.  Refer to the KSL Server Integration Guide for more details.

Permissions given to components and services

In the menu Permissions > Components and Permissions > Services in KSL Admin, and for each group created, it is possible to modify the "components" rules, especially in the context where emailing is integrated to an existing project.

- The *AccesBibliothèques* rules (*LibraryAccess* in English) manages the permissions to add, delete, modify and personalize the different content: templates, personalized and graphical modules.

The screenshot shows the 'Rule permissions' window for the rule 'AccesBibliotheques'. The 'Location' field is empty, and the 'User/Group' field is also empty. Below the search buttons, a table lists permissions for various user groups.

User/Group	Location	Create	Modify	Delete	Reading	Modify in preview (text zone only)
ADMINISTRATEURS *	/BIBLIOTHEQUES DESIGN EMAIL	✓	✓	✓	✓	✓
VALIDEURS *	/BIBLIOTHEQUES DESIGN EMAIL/MES MODELES				✓	✓
USERS *	/BIBLIOTHEQUES DESIGN EMAIL/MES MODELES				✓	✓
USERS *	/BIBLIOTHEQUES DESIGN EMAIL/MODULES GRAPHIQUES				✓	✓
VALIDEURS *	/BIBLIOTHEQUES DESIGN EMAIL/MODULES GRAPHIQUES				✓	✓
VALIDEURS *	/BIBLIOTHEQUES DESIGN EMAIL/MODULES PERSONNALISES				✓	✓
USERS *	/BIBLIOTHEQUES DESIGN EMAIL/MODULES PERSONNALISES				✓	✓

- The *AccesData* rule manages access permission to files available in the repository, mainly the file defining hyperlinks and the file including test recipients.
- The *AccesImages* rule manages access permission to the shared pictures of the repository.

The screenshot shows the 'Rule permissions' window for the rule 'AccesImages'. The 'Location' field is empty, and the 'User/Group' field is also empty. Below the search buttons, a table lists permissions for three user groups.

User/Group	Location	Create	Modify	Delete	Reading
USERS *	/IMAGES & ILLUSTRATIONS				✓
ADMINISTRATEURS *	/IMAGES & ILLUSTRATIONS	✓	✓	✓	✓
VALIDEURS *	/IMAGES & ILLUSTRATIONS				✓

With regard to permissions on services, the three groups have the right to create an email using the services of the directory (/SERVICES EMAILING). The ADMIN group has permissions to add and delete components of this directory.

Mail account for sending emails

A "MARKETING" mail account is defined by default in the menu Distribution > Email accounts in KSL Admin. It is necessary to configure it for delivering emails.

Mail parameters

Mail account name *

Enable trace on the server

Default account

Outgoing mail server

Server name *

Protocol

Port

Account *

Password

My outgoing server requires authentication

Encryption

Acknowledge receipt

Request read receipt

Sender address

User name

Incoming mail server

Server name

Protocol

Port

Account

Password

Encryption

Forwarding mails not recognized as receipts

Forwarding address

The "MaquetteEmailing_500px" (default KSL email template) can be configured with the menu Services > Services and its parameters can be modified in Ksl Admin

Functional parameters

Service : MaquetteEmailing_500px Description : Création d'un Emailing

Name

1 20

<input type="checkbox"/> Name ▲	Description	Display order	Type	Default value
<input type="checkbox"/> feuillestyles	Charte graphique	5	Character	FS_EMAILING
<input type="checkbox"/> KslCharset	Page de code des fichiers CSV	3	Character	UTF-8
<input type="checkbox"/> MailAccount	Expéditeur	5	Character	NAELAN
<input type="checkbox"/> MailBat	Bon à Tirer	10	Boolean	True
<input type="checkbox"/> MailCsvFile	Liste des destinataires pour la campagne	2	Character	
<input type="checkbox"/> MailCsvHeader	Colonnes de la liste des destinataires - séparateur ;	6	Character	CIVILITE_CLIENT;PRENOM_CLIENT;NOM_CLIENT;EMAIL_CLIENT
<input type="checkbox"/> MailCsvTestFile	Liste des destinataires pour test	1	Character	
<input type="checkbox"/> MailLinkFile	Fichier des liens hypertexte	8	Character	
<input type="checkbox"/> MailTitle	Objet	4	Character	<CIVILITE_CLIENT> <PRENOM_CLIENT> <NOM_CLIENT>, découvrez nos nouveautés
<input type="checkbox"/> MailUrl	URL de stockage des images	9	Character	http://91.134.171.102:8080/ksl_office/images

MailCsvFile

Recipient list used for sending emailing (production data file)

This file has the following characteristics:

- Predefined fix structure
- csv or txt file format
- one recipient per line
- with or without an header line
- each column value separated by ";"

This file can be downloaded (action "Browse " locally), to be specified in the parameter configuration. In this case, no default value are set.

Example:

*Mr;Corentin;POUJON;corentin.poujon@naelan.com**Mrs;Estelle;CHASSIS;estellechassis@orange.fr*

MailCsvTestFile

Recipient list for testing

The file defined with this parameter has strictly the same characteristics as the MailCsvFile file. This parameter allows the user to specify a test file from a list of predefined test files created in the repository or available on a local directory.

MailCharset

Code page of external files (recipient list)

Set by default on universal UTF-8 code page. This parameter allows to set the encoding codes used by the csv or txt files used.

A list of code pages are provided:

- *Universal (UTF-8)*
- *Windows (windows-1252)*
- *Linux (ISO8859-15)*

MailTitle

Email object

Mandatory parameter for launching an emailing. However, it is not necessary to assign a default value to it.

Mail Account

Recipient identification

The default sender is typically selected from the list of mail accounts defined in the Distribution menu (see above).

feuillestyles

Style sheet

By default, the standard KSL style sheet is selected.

If multiple "mirror" style sheets exist (same style name with different colors and fonts), let the user choose it from a list of style sheets.

If no style sheet is associated with this parameter, the style sheets defined for each components will be used.


MailCsvHeader


Column list of the recipient files

This parameter is not displayed (by default) when launching the emailing; it contains the descriptor of the contact file, i.e. the names of the fields separated by the character ";".

Example:

```
TITLE;FIRSTNAME;LASTNAME;EMAIL_ADDRESS
```

 The field names must correspond strictly to the names of the variables/fields inserted in the email.

 A "#" added at the beginning of the header line of the recipient file allows to describe the file, as an alternative of the MailCsvHeader parameter; but in this case, the MailCsvHeader parameter must be empty.

Example:

```
#TITLE;FIRSTNAME;LASTNAME;EMAIL_ADDRESS
```

```
Mr;Corentin;POUJON;corentin.poujon@naelan.com
```

```
Mrs;Estelle;CHASSIS;estellechassis@orange.fr
```


MailUrl

Image location URL

This parameter is mandatory. It allows to define the image location address (URL). All the images used by emails will have to be stored in this location. This URL must be permanently available so that email image be displayed on any media and device.

Example:

http://ksl.naelanserver.fr/officeemail/pictures

 It may be interesting to synchronize the physical components/picture directory of the project of the KSL Server with this dedicated URL, so that it automatically benefits from the latest images added to the KSL repository.

The URL set in the default project (<http://localhost:8080/pictures>) addresses the local image directory of the workstation. Just copy the contents of the/picture directory of the emailing project to the /Tomcat/webapps/pictures sub-directory. This setting facilitates testing by allowing to display the responsive HTML5 rendered for email bodies during emailing design, but this URL is not suitable for production: choose an shared and always available URL.

*MailBat**Preview indicator*

This Boolean parameter is automatically set to true or false depending on the production service used: preview or delivery.

Any other parameter value in this service will overload the one transmitted when creating the mail, or the parameter value defined as a default in the "MaquetteEmailing_500px " service.

The DiffusionEmail and DiffusionEmail_Test services (emailing based on a recipient list) are composite services integrating the BuildResponsiveMail service. They also inherit values transmitted to the "MaquetteEmailing_500px" service parameters; the value of these parameters must not be directly set.

Preview actions and Preview action groups associated with email creation

The menu Services > Preview actions allows to access to all the user's actions:

Preview actions		
<input type="checkbox"/> Name	Button label	Service
<input type="checkbox"/> Prévisualisation	Prévisualiser l'email	BuildResponsiveEmail
<input type="checkbox"/> EnvoiTest	Tester la campagne Emailing	DiffusionEmail_test
<input type="checkbox"/> Workflow	Diffuser pour validation	ID_EnvoiWorkflow
<input type="checkbox"/> Archivage	Archiver la campagne	ID_ArchiveCampagne
<input type="checkbox"/> EnvoiEmail	Lancer la campagne Emailing	DiffusionEmail

When creating or selecting an action, it is possible to set its parameters and the action button icon:

Action update

Name *

Menu label *

Comment

Service *

Ask document name before running action
 Remove document after running action
 Close document after running action
 Ask for missing parameters
 Allow all user groups to run this action
 Hide when document is archived
 Hide when document is frozen
 User groups allowed to run this action

Mandatory size: 24x24 pixels.

A set of icons are provided, for example the icon for a display of email html bodies. But a customized button can be configured for each action.

The *menus Services > Preview action groups* allows to define groups of actions:

Actions groups	
<input type="checkbox"/> Group name	Default group for document production
<input type="checkbox"/> ActionEmailsUnitaires	
<input type="checkbox"/> ActionsEmailing	
<input type="checkbox"/> DefaultGroup	

3.4. A view and services dedicated to email

The Emailing view of KSL Office


The button Emailing allows to create an Emailing tab in the KSL office portal. This tab is a view specific to KSL Email Designer for creating and sending e-mails or preparing e-mail campaigns.


This view is accessible in the following conditions:

- The project contains services.
- The user, or the group to which he belongs, is allowed to access the production services dedicated to the e-mail (select the option E-mail creation in the permission parameters relative to the tree node where the email service is classified).
- And the KSL Office portal profile includes the Emailing view.

This view of "production of e-mailings" differs from the Document production view by a set of special features, including:

- The ability to directly save the email created as a template in the resource repository.
- The ability to add new variables to the dictionary. The user can then integrate them into his content when designing an email. When he launches the preview or send the email, these variables will be replaced by the data of the contact list (file .csv).
- The ability to add hyperlinks on an image or text.

 Unlike an interactive document, it is impossible to integrate external files or local images into the interactive e-mail created in this view; these features are inappropriate for creating an e-mail body.

The button  allows to manage the view settings. This view is very close to the view Document production. It has a similar configuration for simplifying the editor toolbar.

View configuration Emailing from profile RH

▼ General

Property name	Property description	Property value
Page title	Page Title associated with this view.	Emailing
Project	View project	GESTION_RH - 1.0 - Production
Allow saving text zones in repository	Allow saving text zones from interactive document	No
Allow refreshing from repository	Allow refreshing all document non modified text zones	No
Allow refreshing personalized text zones	Allow coming back to repository text zone	Allowed only when document is freeze
Allow saving email as a model	Allow saving email root group as a new group in repository	No
Root folder for repository	Root folder for inserting text zones or groups from repository	No value
Default style for hyperlinks	Text style used when adding new hyperlink	







▶ Menu configuration

← Back to profiles list ← Back

Parameters of the Emailing view:

Parameters	Description	Default value
Page title	Page title associated to the view.	Emailing

Project	Project on which the view will be based.	The default project of the current profile or the project on which profile was created
Allow saving text zones in repository	Allows a user who has the appropriate permissions on the repository, to substitute from the interactive editor, a text zone of the repository by its modified version of his interactive e-mailing. This saving changes text zones in the repository.	No
Allow refreshing from repository	Allows to refresh all unmodified text zones of the interactive e-mailing. The text zones of the e-mailing are replaced by the newer repository text zones. This parameter allows a user from the interactive e-mailing to update all non-personalizable fixed content of his archived interactive e-mailing, whose content has been frozen. This saving changes text zones of the interactive document.	No

Allow refreshing personalized text zones	<p>Allows updating text zone of an interactive e-mailing to newer versions (of these text zones) available in the repository.</p> <p>This parameter applies only to archived interactive e-mailing.</p> <p>3 possible values: Three values are possible:</p> <ul style="list-style-type: none"> - Allowed: the user can refresh the text zones that have been personalized. - Not Allowed. - Allowed only when document is frozen (e-mailing whose contents were frozen during archiving). <p>If this parameter is set to Allowed or Allowed only when document is frozen, then the button  or  appears on to the right of each text zone that has been personalized in the interactive e-mailing. The button  appears when if the date of modification of the text zone in the repository is greater than the one in the e-mailing. This button replaces the personalized text zone with the reference text zone of the repository.</p> <p> After substitution, the button  of the tool bar allows to cancel the action (but if you quit the interactive e-mailing and reopen it, the previous action cannot be cancel anymore).</p> <p> It is important to note that this update feature is usable for any interactive e-mailing, archived or not (with restrictions on its frozen or non-frozen nature for the 3rd value).</p>	Allowed only when document is frozen
Allow saving email as a model	Allows the user, on action Save email as template to create a new group with a custom name in the repository. This new group is a copy of the main group of e-mailing that has been designed and is to be considered as the model of e-mailing.	Non
Root folder for repository	Parent folder for inserting text zones or groups in the repository : this is the branch of the classification map under which all the resources necessary for creating the body of e-mail are available: template library, graphic blocks and custom blocks.	

Default style for hyperlinks	<p>Text Style used when inserting a new hyperlink and which is present in the style sheet used by the e-mail. This style makes it possible to distinguish the hyperlink within the text of the e-mail.</p> <p>This parameter is not mandatory, in which case the text on which the link is added remains in the current style (but not recommended).</p> <p>In any case, it is possible to change the style of the text associated with the link after creating contents.</p>	
Enable the bold menu	Enable or disable menus and buttons to set text in bold.	Yes
Enable the italic menu	Enable or disable menus and buttons to set text in italic.	Yes
Enable the underlined menu	Enables the activation or deactivation of menus and buttons to underline text.	Yes
Enable the subscript-superscript menu	Enables the activation or deactivation of menus and buttons to set text in subscript or superscript.	Yes
Enable the text color menu	Enables the activation or deactivation of menus and buttons to color text.	Yes
Enable the background color menu	Allows the activation or deactivation of menus and buttons to color background text.	Yes
Enable the change of style	Allows the activation or deactivation of menus and buttons to change the style of the text.	Yes
Enable the alignment change	Enables the activation or deactivation of menus and buttons to change the alignment of the text.	Yes
Enable the variable insertion menu	Enables the activation or deactivation of menus and buttons to insert a variable.	Yes
Enable the stylesheet menu	Enable or disable menus and buttons to change the style sheet.	Yes
Enable the local image insertion menu	Enables the activation or deactivation of menus and buttons to insert a local image.	Yes
Enable the repository image insertion menu	Allows the activation or deactivation of menus and buttons to insert an image of the KSL repository.	Yes
Enable the borders and shading menu	Enables the activation or deactivation of menus and buttons to manage borders and shading.	Yes
Enable the paragraph menu	Enables the activation or deactivation of menus and buttons to manage paragraphs.	Yes
Enable the bullets and numbering menu	Enables the activation or deactivation of menus and buttons to manage bullets and numbering.	Yes
Enable the variable format menu	Enables the activation or deactivation of menus and buttons to manage the format of variables.	Yes

Enable the caesura menu	Allows the activation or deactivation of menus and buttons to manage the hyphenation.	Yes
Enable the table menu	Enables the activation or deactivation of menus and buttons to manage tables.	Yes
Enable the spell checker menu	Enables the activation or deactivation of menus and buttons for the spell checker.	Yes

Add Email creation permission on a repository subtree to a user or group of user

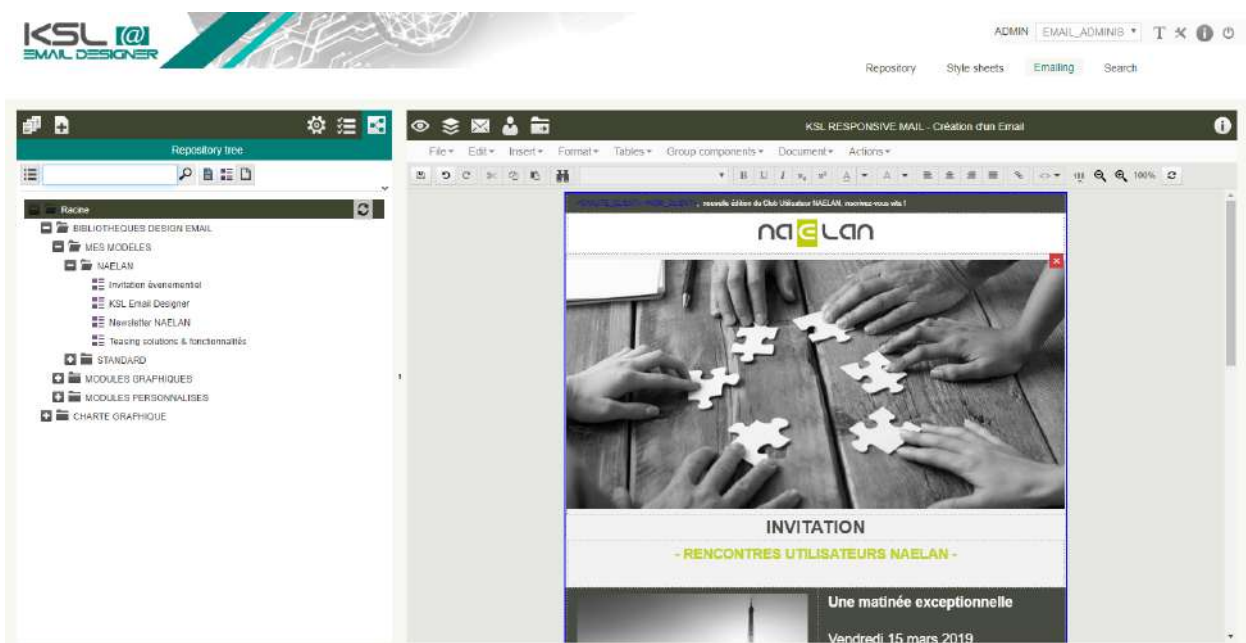
In the menu Permissions > Services in KSL Admin, permissions can be defined to allow users to created email from the repository:



It is necessary to gather the services that produce the "responsive" emails in the same node within the classification tree of the repository.

As for permissions given to an interactive document template, this tree will be "typed" as "E-mail creation"; which will allow services to be available in the dedicated view, and only in the dedicated view.

3.5. Office, a content management platform dedicated to functional administrators



A functional administrator can have 4 views or tabs on this autonomous and shared design platform, as a thin client:

- the style sheet to implement the graphic charter common to all bricks
- the library of shared metamodels and resources (images, illustrations and content) for maintenance
- the email design platform
- validation workflow and archived campaigns

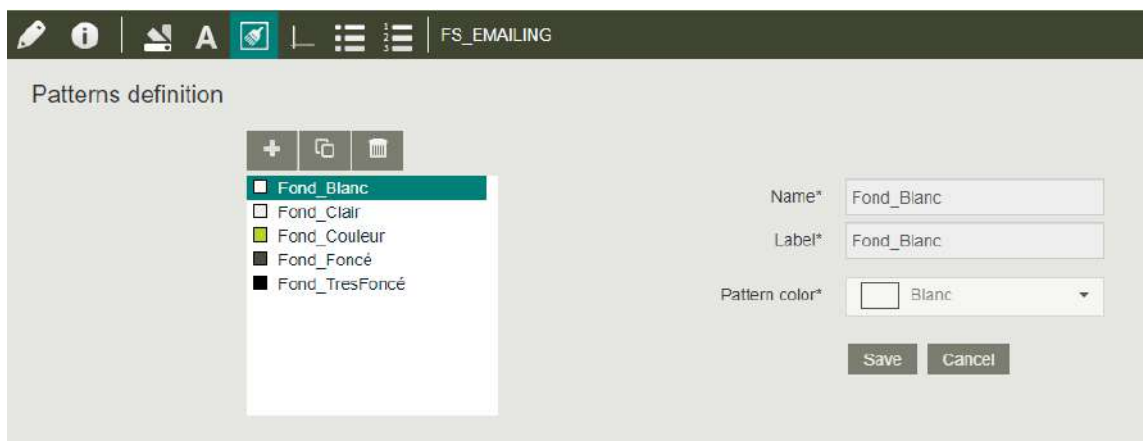
An end user may have views restricted to email design and archiving.

4. A library of shared and modifiable resources

4.1. Description of the default "FS_EMAILING" style sheet

The FS_EMAILING stylesheet can be modified thanks to the Office application with administrator's permissions.

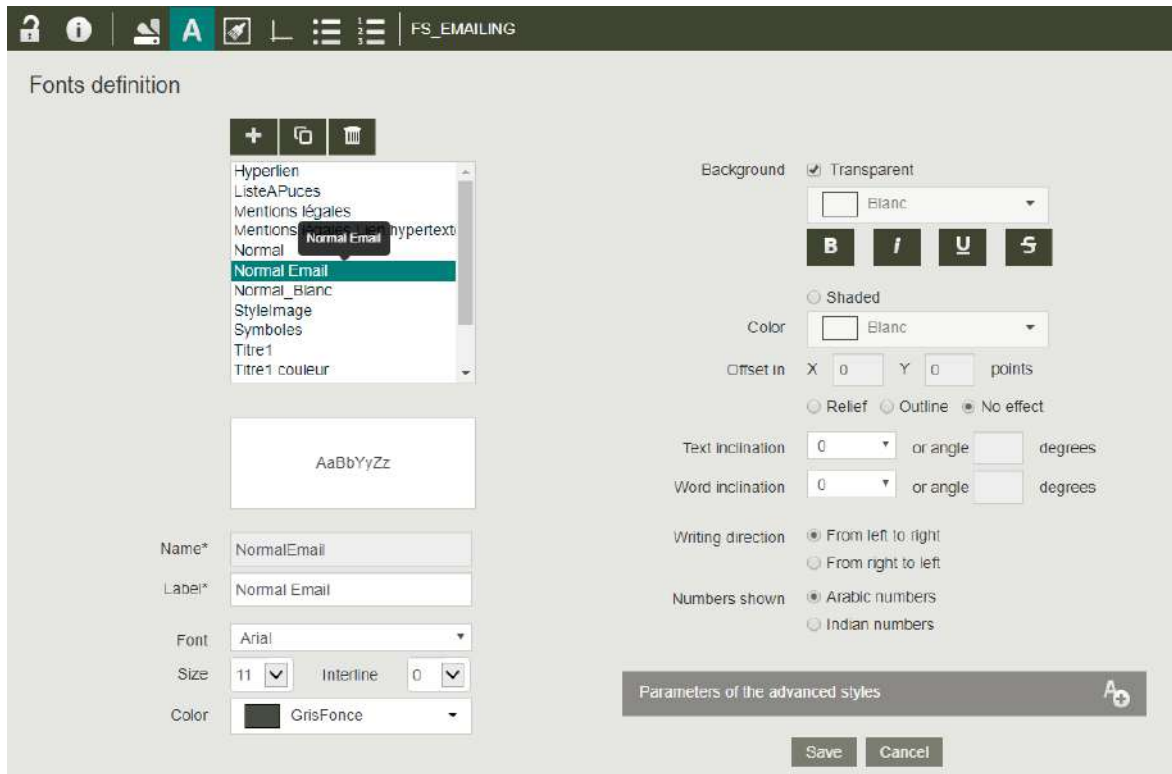
Based on the 3 colors, plus white and black, on color patterns:



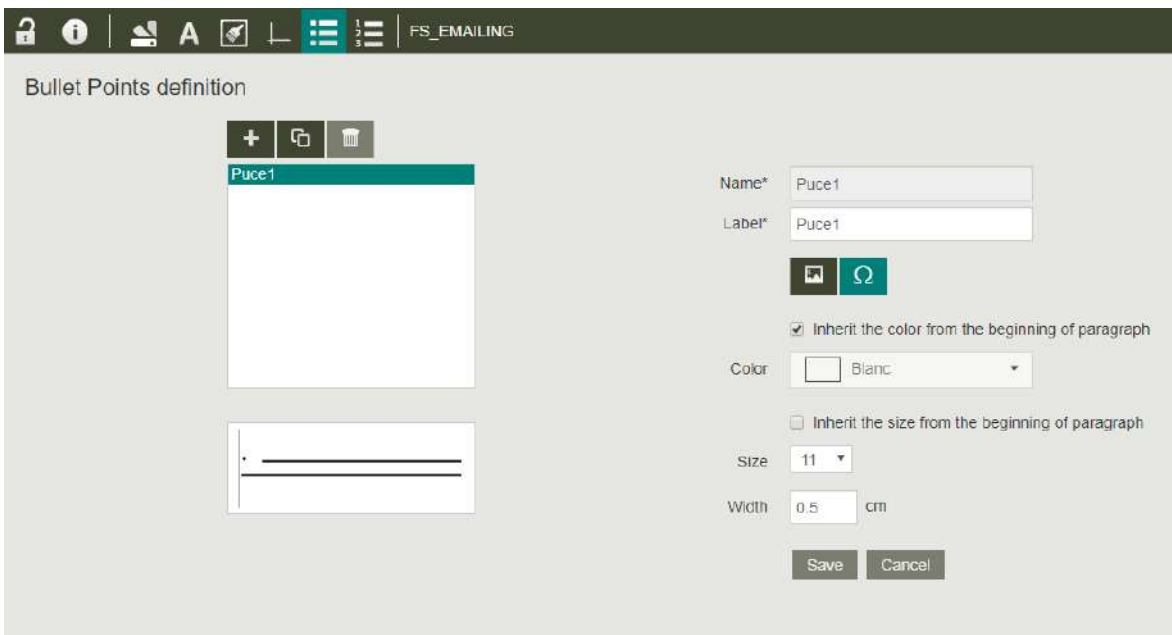
These background colors allow to structure the different information blocks in emails.

An only one character font: Arial

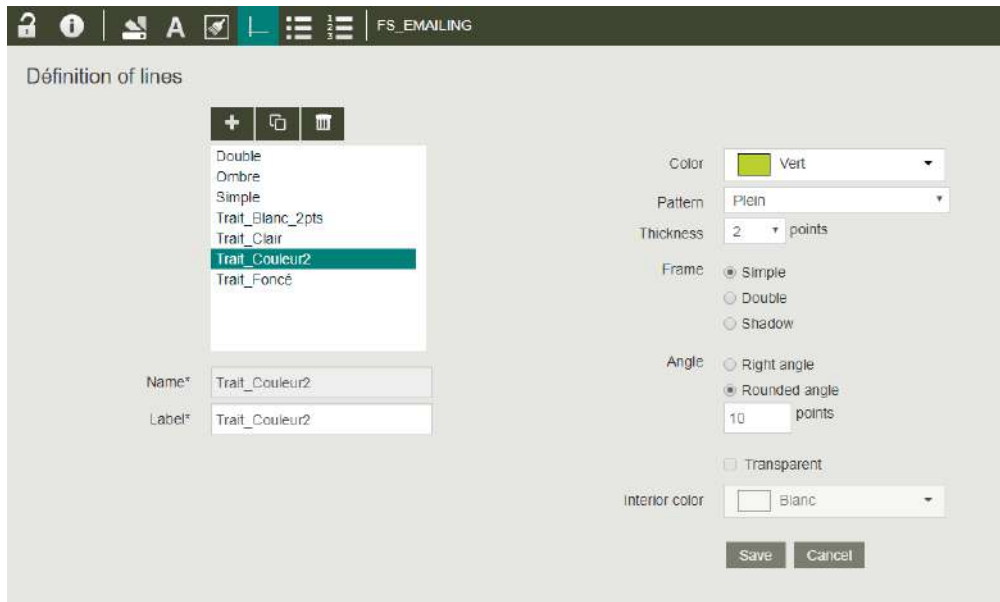
- Size 11 for content,
- Provided in several heights for titles and legal notices,
- and in several colors for dark backgrounds



A simple bullet point style (style arial) for listing text items in emails:



4 line styles: bold white, color, light and dark lines, mainly for the borders of information blocks:



Changing style sheets: 'mirror' style sheets

When a new email is created, a parameter (stylesheets) allows to change the default style sheet.

The reference style sheet can effectively be replaced by a new style sheet, provided that it contains strictly the same identifiers for the objects used: name of styles, name of patterns, name of lines styles and name of bullet points.

These elements can, of course, be configured differently:

- Color change for the patterns,
- Font, color and style changes
- Line color change, etc.

For ease, the new style sheet is created from the reference style sheet (File, Save under) and immediately stored in the repository. The object configuration is then changed without affecting their designation.

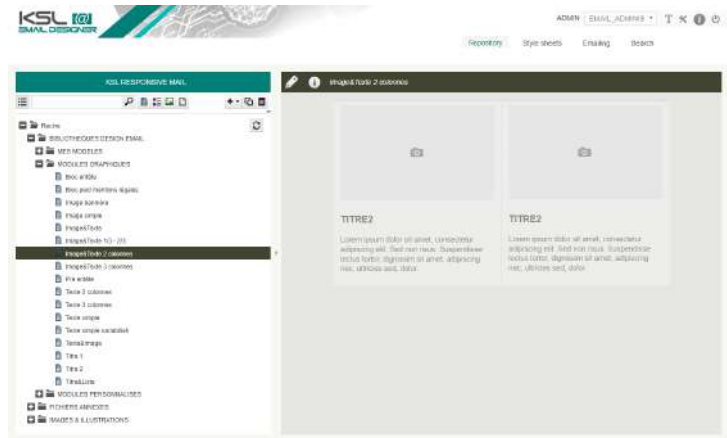
These style sheets are called "mirrors." They allow to instantly adapt the graphic styles of a communication during its production, without modifying its components.

4.2. Graphic modules or blocks

The components displayed below are accessible and can be modified via the repository of the Office application.

Graphic blocks or modules are the components for a consistent and perfect email design.

They have a format and characteristics that meet the requirements of responsive email, especially in terms of size and presentation to anticipate the formatting of information on smartphone screens (for example).



The repository contains a library of blocks of different structures: banner image, title and text, image and text, image and text on 2 columns, on 3 columns, title and list, varied text, title alone, etc.

The objects of each block are arranged within a table that will allow a harmonious reorganization of the information during the responsive adaptation. The width of this table fully fills the width of the block.

These blocks can be re-adapted to a corporate identity. The list of blocks can also be enriched to meet specifications in terms of presentation of information, for more efficiency when creating an email. In this context, it is simple to copy an existing block to complete or transform it.

4.3. Configuring blocks of information

Responsive mode automatically reorganizes the cells of an information block by passing them under the other on a Z format, for a smaller display.

In a table with multiple columns and lines, it is not recommended to split a single "y" column on several lines or to merge several lines "in y" on a single column. The new cells will not be "rolled up" in the consistent order of initial presentation of the information.

Below are some illustrated examples of possible cuttings:

1	2	3
---	---	---

1	2	3
4	5	6

1	2	3
4		5

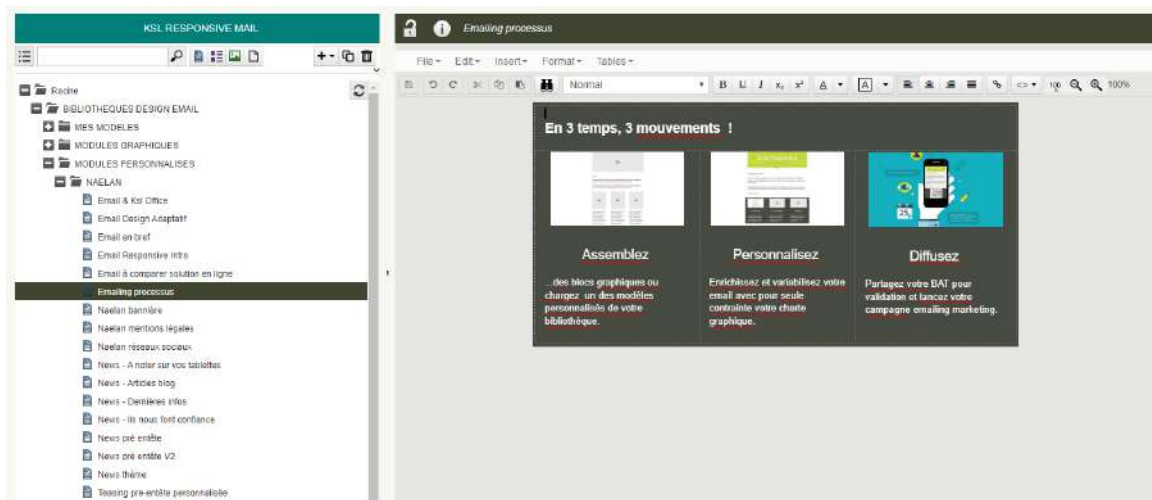
1	2	
3	4	5

and some examples of cuttings not recommended:

1	2	3
4		5

1	2	4
	3	

4.4. Custom modules or blocks

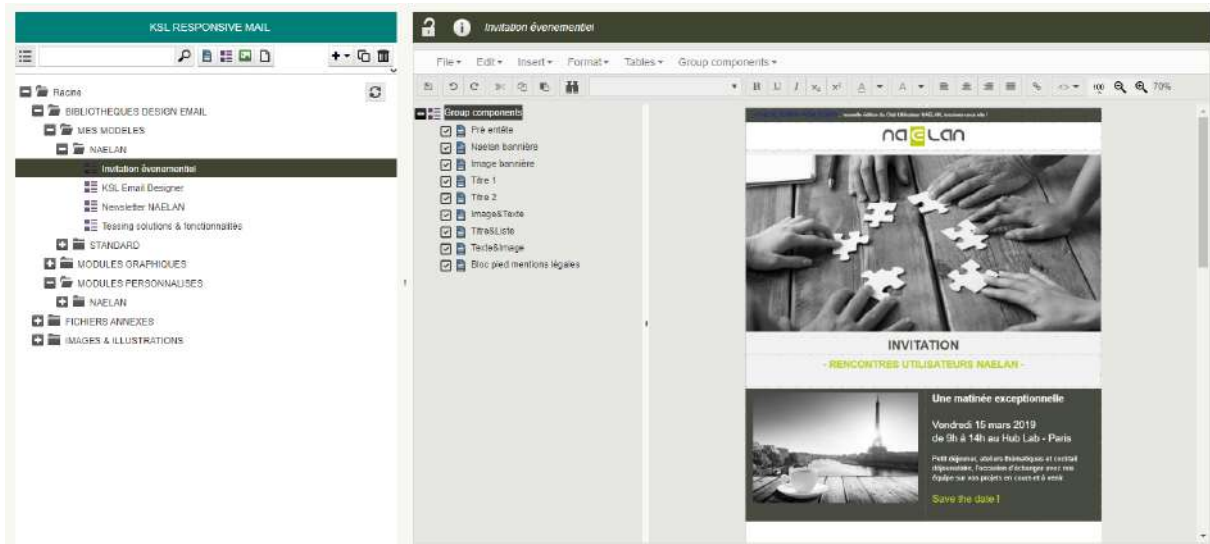


Custom blocks contain meaningful texts and/or images and are potentially reusable, i.e. shared by multiple emails. They are copied, for the form, from the library of graphic blocks.

A "company" banner (logo + illustration), a contact block, a signature block, company contact information, legal mentions, icons of social networks... are all elements that can be assembled within several email templates, or recalled directly when creating a new email.

i The modification or update (addresses, phones, mentions, hyperlinks, logos...) of a custom block automatically impacts all models of email that use it.

4.5. Model library



Custom templates are an assembly (or group) of already customized blocks or graphic blocks to personalize when designing the email.

A model may be intentionally incomplete, and contain only the upper or lower part, and especially the mandatory information. It will then be completed when creating the email with new blocks of information.

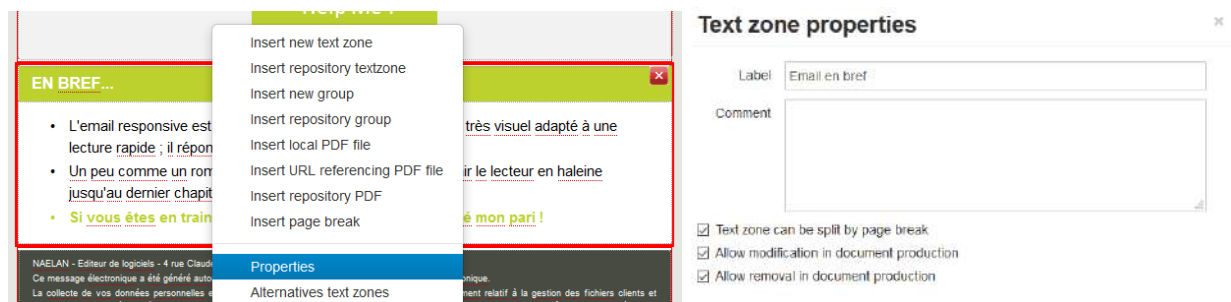
Notes:

- Any block customization in the custom model directly impacts the block customized and, therefore, all the models that use it. It is therefore recommended to change carefully the model in the repository.
- The library of custom models, "My Models", will be mainly enriched during the process of designing a new email, since it will be possible to save it as a model.

SOME RULES TO AVOID MISTAKES

Custom models allow the administrator to impose basic rules to secure the email design.

Select the block, right click and select Properties.



Each block in a model:

- Can be allowed or not to be modified in KSL Interactive (option set by default); if not, its content will be locked.

- Can be allowed or not to be removed in KSL Interactive (option set by default); if not, the block is locked.

It is therefore possible to make the content of certain blocks mandatory on the model for the user who designs the email: top header, company logo, contact block, legal mentions..., to avoid unfortunate updates or update problems.

4.6. Additional files

The centralized hyperlinks file "emailing_links.csv" is available in the repository tree.

Each link potentially shared by a group of email (company website, social network access, opt-out link for example) is defined by a line following the format below:

Identifier;label;URL

This list is to be completed. It is accessible when the user inserts hyperlinks in the email, on a text or image.

4.7. Images & illustrations

The STANDARD branch contains the illustrations shared by the graphic blocks.

The NAELAN branch contains examples of custom blocks.

This branch will be replaced by the usual storage space for the project illustrations if responsive email is integrated into an existing project.

It can also be completed to dedicate a branch to the illustrations of the responsive email.

Adjust the picture call to the recipient's profile

It is possible to modify the picture called during the composition of each email, by varying its name using fields associated with the targeted recipient. It is then necessary that these fields are present in the stream transmitted for the Emailing.

In the repository,

- Position the cursor on the picture which must be conditioned
- Right click, then select Properties
- Replace all or part of the picture name by a variable available in the data flow; this will be entered between rafters (< and >)
- If it is necessary to completely replace the picture name, the variable must also contain the extension associated with the picture
- The name thus composed must correspond to the name of picture present under the configured URL

Picture name

Picture size

Maintain the proportions

Zoom

Width

Height

Hyperlink

Alternative text

No link

Prest link

Links

Local link

URL

Access to the picture name in the properties is conditioned by a parameter present for the Repository view (configuration of Office profiles under Admin).


i Notes:

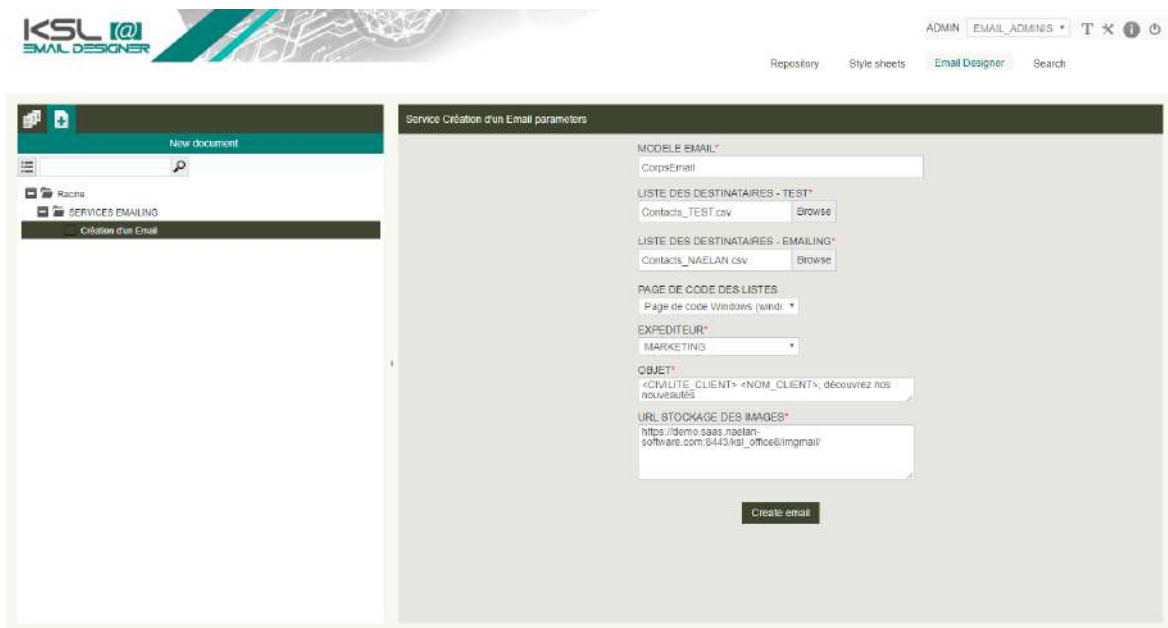
- All images used or potentially usable in the mail body must be present and accessible by the URL (the parameter MailUrl which is a mandatory information for the MaquetteEmailing-500px service), in addition to their presence in the repository.
- As specified on the setting part, it may be interesting to synchronize the physical directory components/picture of the project with this dedicated URL, so that it automatically benefits from the latest images loaded into the repository.

5. Create an emailing

5.1. Create and set up an emailing from KSL Interactive


To create an emailing, click on the Emailing tab, then choose an email creation service; The "Create an Email" service is available by default.

 An email or emailing can also be created from an external application (e.g. a CRM software).



The parameters of the service can be selected:

- The meta model used, chosen from the meta models available in the repository. The latter can be summary and include only a set of basic bricks and non-modifiable legal notices for example. It can also be defined by default and not be accessible at the level of this design form.
- The recipient addresses for tests
- The recipient addresses for launching the campaign

 Notes concerning the input data:

Several ways to link the contact list to the emailing campaign:

- Upload a file, i.e. select it on the local workstation or on the shared directory of a server on which the data is usually available; In this context, it can be test files or the final production list of contacts for the campaign.
- Choose the contact file via the combo-box from a list of predefined files. The files will be accessible in a directory of the server, but the list remains relatively limited.
- Select a set of criteria/parameters (age, gender, zip code, etc.) that will drive data extraction before starting the email processing. This advanced integration action can complement the default integration (to be seen with our KSL Suite consultants).

- The code page of the file, depending on its source (e.g. universal UTF8, Windows 1252 or Linux

iso8859-15)

- The header elements of the email:
 - Object (mandatory): Note that object can be personalized with variable using the data of the recipient list; Simply enter the exact name of the piece of data (or pieces) between angle brackets where inserting a data. For example: <FIRSTNAME>, *we wish you good holidays!*
 - Sender: it is the mail account declared in the Distribution menu in KSL Admin

- The image storage URL is completed by default for all launches; this option is rarely visible on this form.



It is also possible to activate a dynamic selection of a style sheet, in the particular context of a multi-brand management for example (see chapter 4.1 - mirror-style sheets).

These parameters can be changed at any time when designing the email.

These email services gives access to the design tool of the communication.

5.2. Choose how to start the new emailing

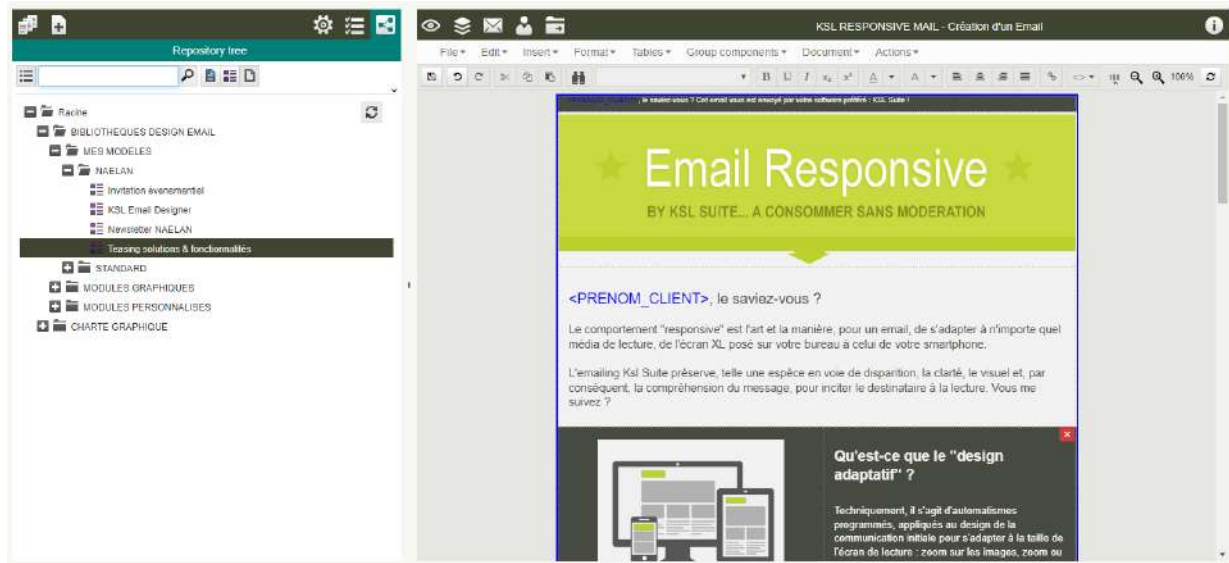
By default, at the beginning of the emailing creation process, a blanc page appears and the different resources of the library are available:

- Custom models
- Custom blocks
- Graphic block to custom

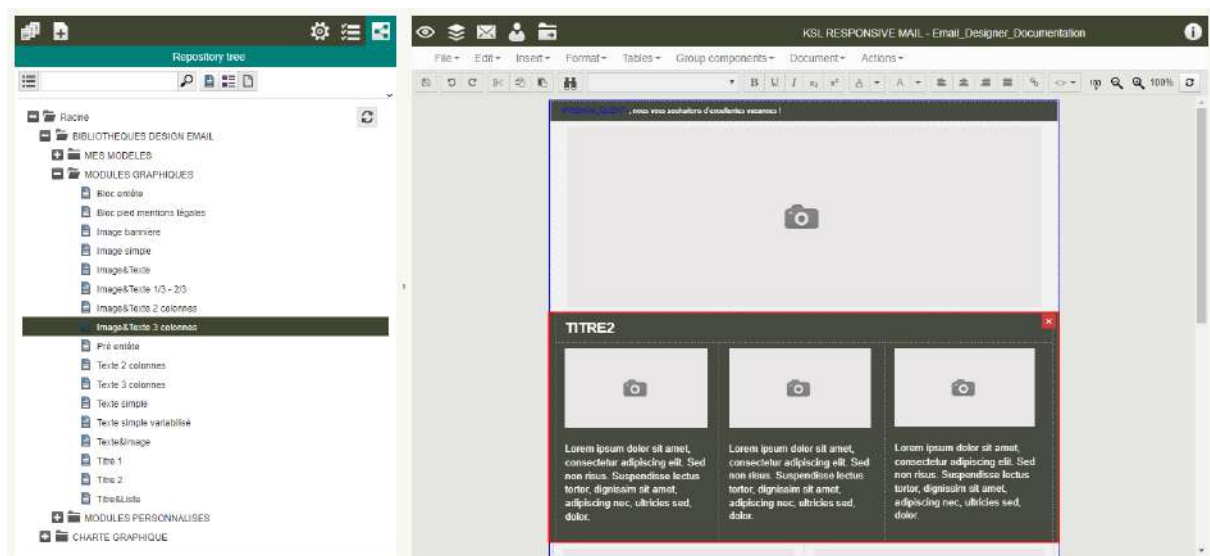
It is possible to select one of the existing models and customized it, or select and assemble some blocks/modules, in order to create a new emailing and, why not, a new model.

To do it, access to the library and drag and drop a model or blocks in the blank page.

Emailing creation from an existing model:



Emailing creation by assembling blocks:



5.3. Personalize the content of the emailing

No matter how the emailing is built, the selected content can be personalized by double-clicking it.

An image presented can be substituted by an image available in the repository:

- Double click on the image: a blue filter indicates that it is selected.
- Right click than select Insert an image from the repository



i It is not possible to add local images because an email that arrives in the inbox of a recipient includes the URL to the images and images are downloaded before displayed in the page. The images are never "embedded" in the mail body to avoid sending oversized emails. The images will therefore be stored in the resource repository but also on a shared web directory accessible at any time to recipients.

i It is possible to fine-tune the size of images but in any case they will be adapted to the recipient's device (responsive email), while remaining proportional. The width specified in the properties will be the maximum width of the image.

Replace, review, personalize texts and titles

The selected style sheet will allow to always respecting the styles rules.

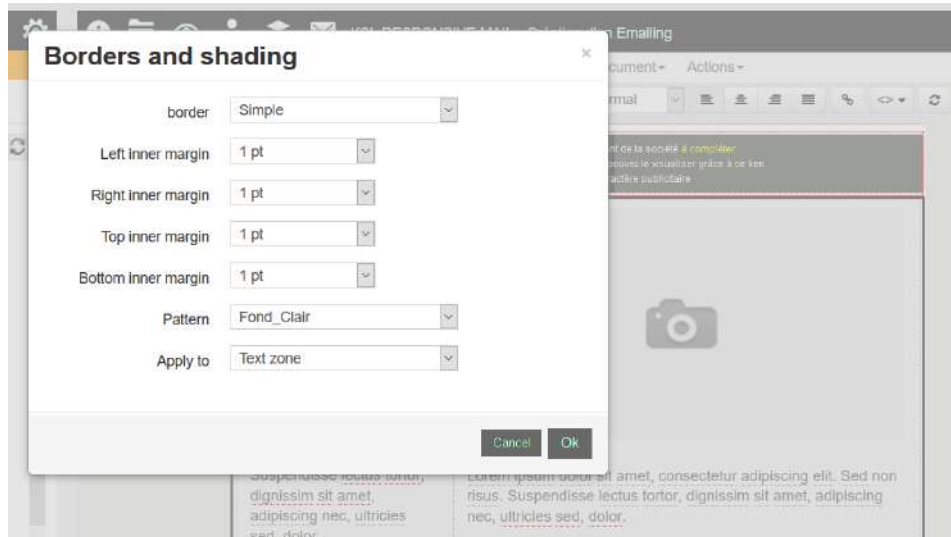
Add action buttons

Adding buttons is mandatory for an interactive communication: these buttons will consist in images with an hyperlink.

Work with background colors on each cell of information

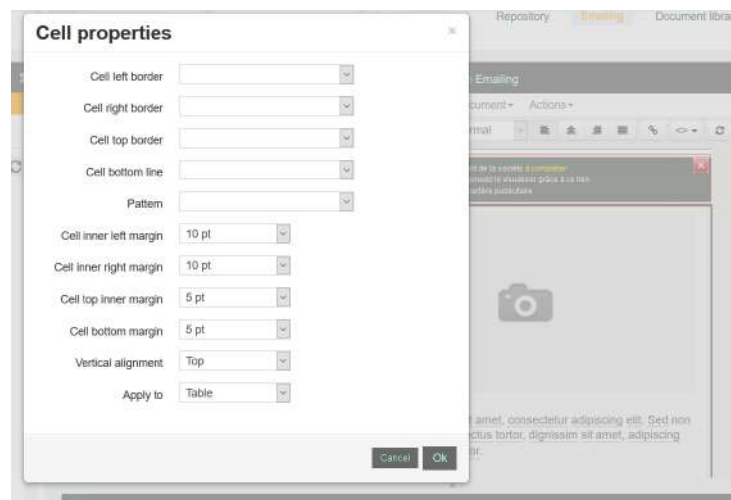
Each block can potentially be colored using the patterns defined in the style sheet.

In the menu bar, select Format > Borders and shading, and then the pattern in the predefined list.



An information block can be highlighted with a dark background; in this case, simply use a clear or white font color for text.

i A background color can be associated to the different cells of a block. Select the cells, then select the option Tables > Cells properties, and choose a pattern of the style sheet. Note that the color of the cells will cover the background of the block.




Complete an existing block (with an extra line)

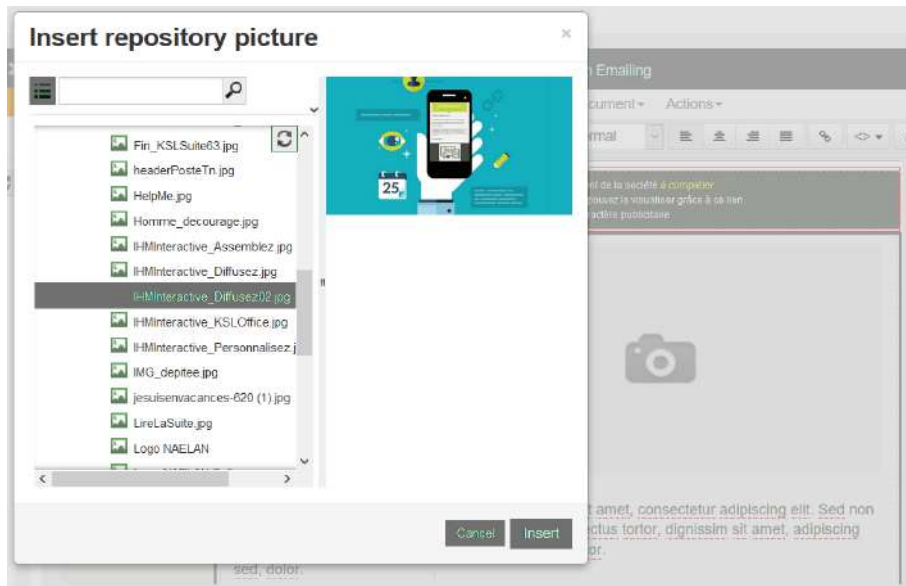
To complete a block, add lines as for a table with the menu Tables > Insert > Line before or Line after.

i Don't forget that a Z structure has to be created for the cells in order to get a responsive display of information.

Add a new block/module in a model

Select the graphic or custom module in the library and drag and drop it in the model at the right position. In case of location error, switch the different blocks inside the model.

 A new component like a new block of text, an image or a template, can be added to the mail body via the right click menu. This action allows also to preview the component before adding it.



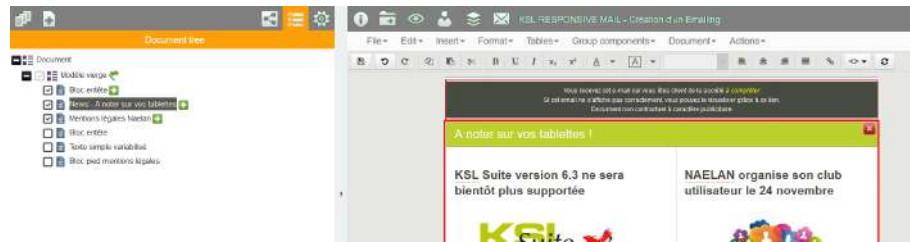
Remove a block/module from a model

Two types of deletion are available:

- A physical deletion: select the block and then right-click and select the option Remove text zone. The block is completely removed from the model.



- A logical deletion: select the block and click on the red cross to delete it. The block does not appear in the model anymore, but is still in the personalized list of components; this list is accessible in the left tab. The block is still available but deactivated. Just check its box in the list again and it reappears on the document.



The "forbidden" events

It is possible that some blocks of the model have been protected:

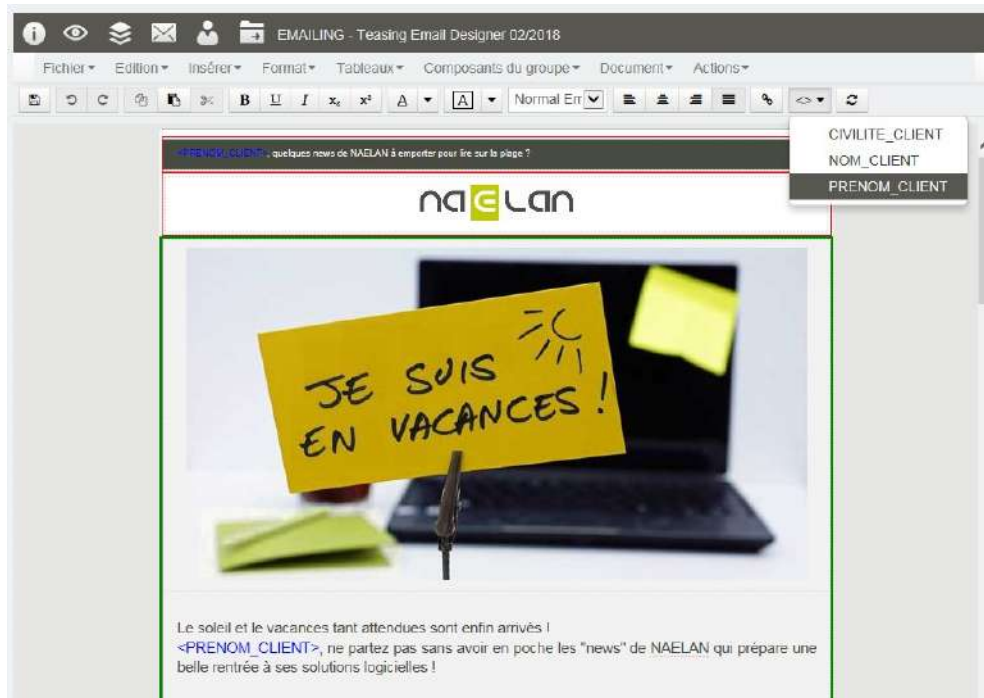
- Their deletion is impossible (physical and logical): in this case, no deletion option is available.
- Their modification is impossible: in this case the block appears in dimmed and cannot be selected.

5.4. Personalize text with variables

Email content can include variables (field) corresponding to the data of the recipient list.

This action allows to personalize each email for the recipient. The most commonly used data is the recipient's title, last name and first name, but data such as the date of birth and place of residence (among others) can also personalize content.

For inserting variable, double click in the text where adding them. Select the double angle brackets in the toolbar "<>" and choose a variable in the list. The variable appears in blue between angle brackets.



If there is a variable missing, create it thanks to the Insert > Add a variable menu.

Variables ✕

Text zone variables

ADR1_ACQ_1

ADR2_ACQ_1

CP_ACQ_1

DateSysteme

DATE_VALIDITE

NOM_ACQ_1

NO_CONTRAT

NO_SOCIETAIRE

PRENOM_ACQ_1

VILLE_ACQ_1

Add
Modify
Remove


Name:

Type:

Length:

Decimals:

Cancel Ok

 The names of the variables must be strictly the same to those declared in the MailCsvHeader parameter (refer to paragraph 3.3), or strictly identical to the names of the columns present in the first line of the recipient list. If it is not the case, email processing will be unable to link the columns in the recipient list to the variables inserted in the email and no automatic "mapping" is possible.

5.5. Personalize the images: the dynamic call

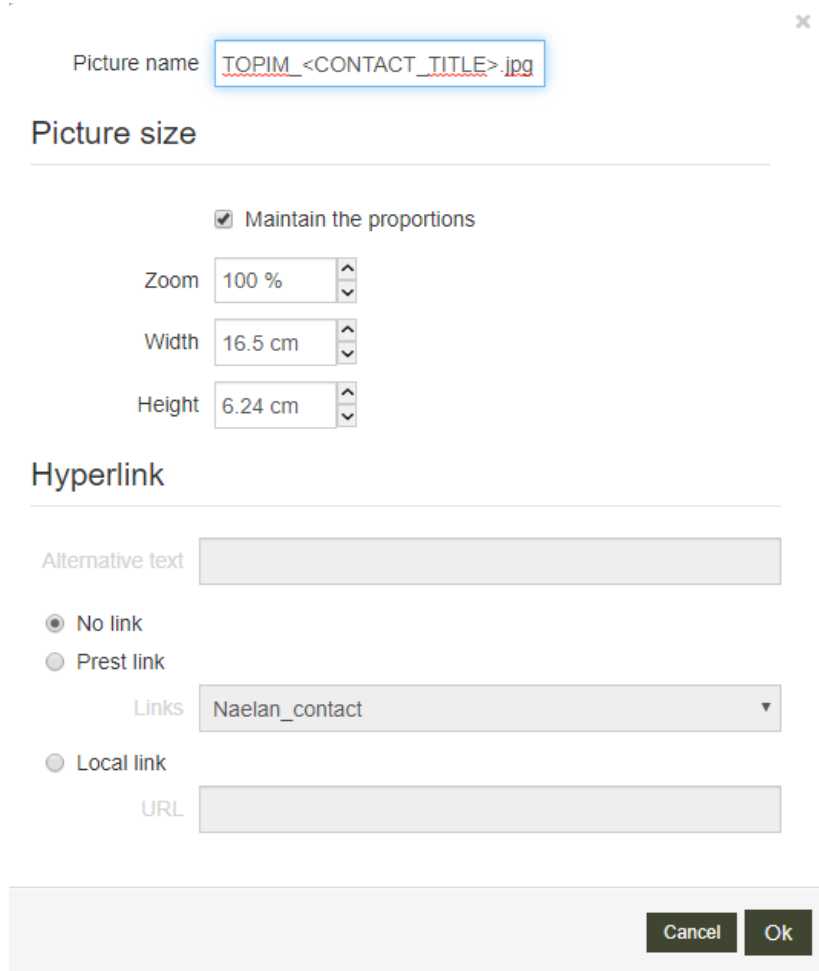
The calls to the images can be done dynamically by using all the data available in the contact list.

This action allows to personalize the images of each email, according to the profile or characteristics of the future reader, but also according to the identity of the sender (logo of a company or a subsidiary for example).

In this context, all or part of the image name must be available in the form of fields in the .csv file attached to the emailing.

The dynamic call is configurable in the image properties:

- Select an image
- Right click then select Picture Properties



Picture name

Picture size

Maintain the proportions

Zoom

Width

Height

Hyperlink

Alternative text

No link

Prest link

Links

Local link

URL

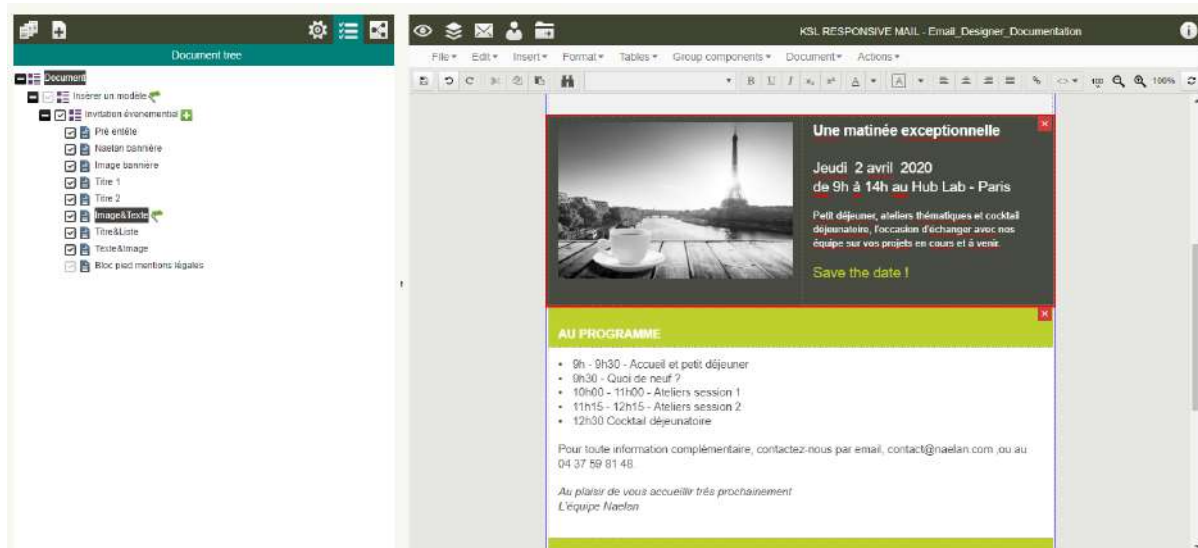
On the name of the image, add the name of the field between rafters, (< >) which will make it possible to call up the desired image. In the example above, <CONTACT_TITLE> will orient the call to the image of the email banner, according to the recipient's title.




The image called via this composite name must be present and accessible via its URL on the dedicated image server.

5.6. Manage the components of the emailing

This window lists the components of the emailing "document".



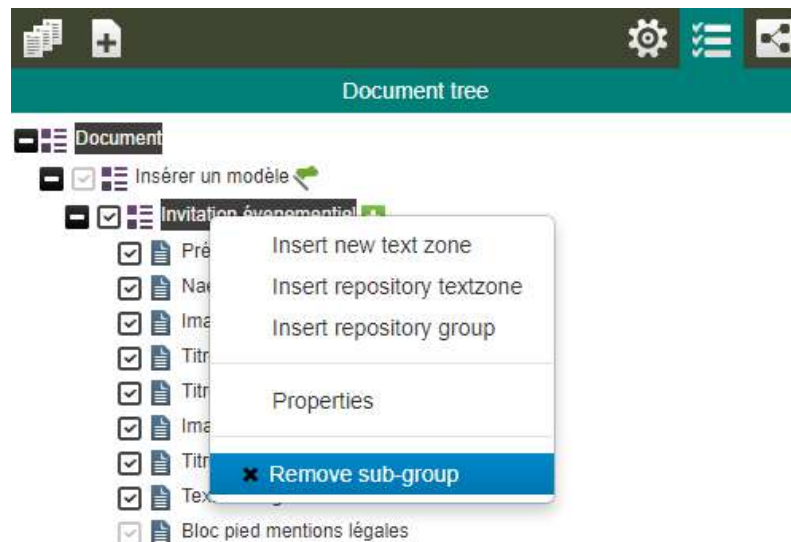
To access to the Document tree window, select the "Document tree" icon  in the top header. This window presents the list of blocks included in the email.

Thanks to the graphical indicators displayed at the right of the list items, the user can rapidly identify:

- the model selected
- the block added to the model selected: "+" icon
- the personalized blocks: flag icon
- the blocks not deletable: dimmed check box
- the blocks logically deleted: unchecked components

Other action possible with Document tree window:

- Delete physically a block (Right click / Remove textzone)
- Reorganize blocks by moving them in the list with the mouse
- Rename blocks, mainly when adding a new block to the model with a meaningful name, (Right click / Properties)
- Remove the current model to substitute it by another one : Right click on the line corresponding to the model and remove it, than drag and drop a new model by selecting it in the repository tree (Repository icon in the top header menu).



5.7. Insert hyperlinks

Hyperlinks can be associated to each image (or image/button) or to a selected part of a text.

Two types of hyperlinks exist:

- Single link: its value is defined during design and is specific to the email context
- Redefined linked: its value is chosen in a list of available links, which is unique for the Ksl project; this link is potentially shared by several objects and emailings.

The style of the text to which associating the link is predefined, by default, in the configuration of the emailing view (in Ksl Admin: menu Ksl Office setup > Office Profile).

"emailing_links.csv", the file of shared links

File in the URL encode format URL.

It centralizes generic or shared links, commonly shared by several emails or models, or even by all models: e.g. the company's website, the unsubscribe link, the access to social networks..

The main advantage of this sharing process is the maintenance productivity when an URL changes, because modifying the URL in the file impacts all the models and components using the URL.

This .csv file is integrated into the repository and physically present in the project directory, in /components/ extern; it can be changed by editing it directly from this directory.

Its structure runs as follows: Name;Label;URL


- Name: the link name provided in the list of available URLs when associating it to an image or text
- Label: text used and displayed in the email
- URL: the hyperlink address

For example:

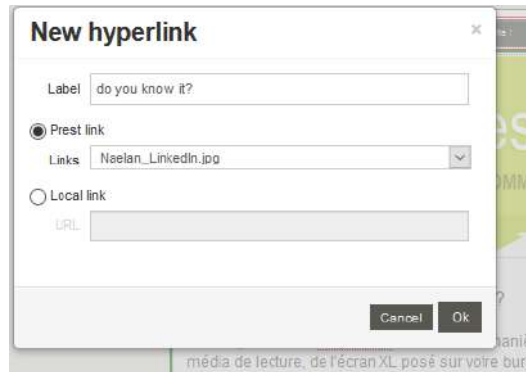
Naelan_site_web;www.naelan.com;http://www.naelan.com

Naelan_contact;Help;http://www.naelan.com/contact/

Add an hyperlink to an text

Select a text and click on the icon  in the toolbar.

In the dialog box, select directly the local URL of the link associated to the text or select it in the list of predefined links.

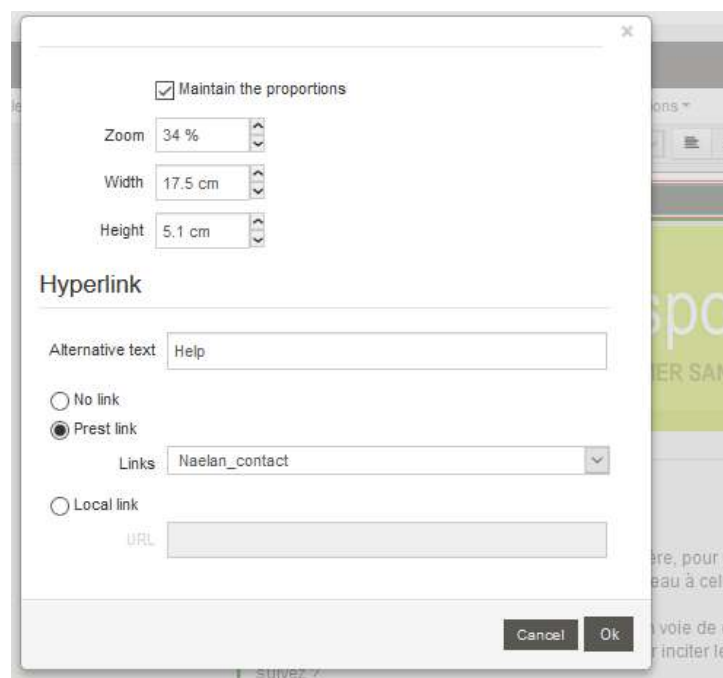


The Label is the text appearing in the email. If no text is selected, the label will be the Label of the predefined link or it will be selected if local.

Add an hyperlink to an image

Select an image, right click and select Properties

The Label for the image is the alternative text used if the image cannot be downloaded; its selection is recommended.



Like the link for a text, select directly the local URL associated with the image or select it from the list proposed if a predefined shared link is used.

Data-driven hyperlinks

It is possible to give a dynamic value to the URL of the hypertext link, whether local or shared (in the centralized file), by positioning a variable between angle brackets on the part of the URL that needs to be replaced by the contents of a variable.

For example:

`http://www.naelan.com/<COMP_NEWS>`

If the value `<COMP_NEWS>` given in the recipient list is:

`2017/07/04/news`

Then the URL will be changed in:

`http://www.naelan.com/2017/07/04/news`

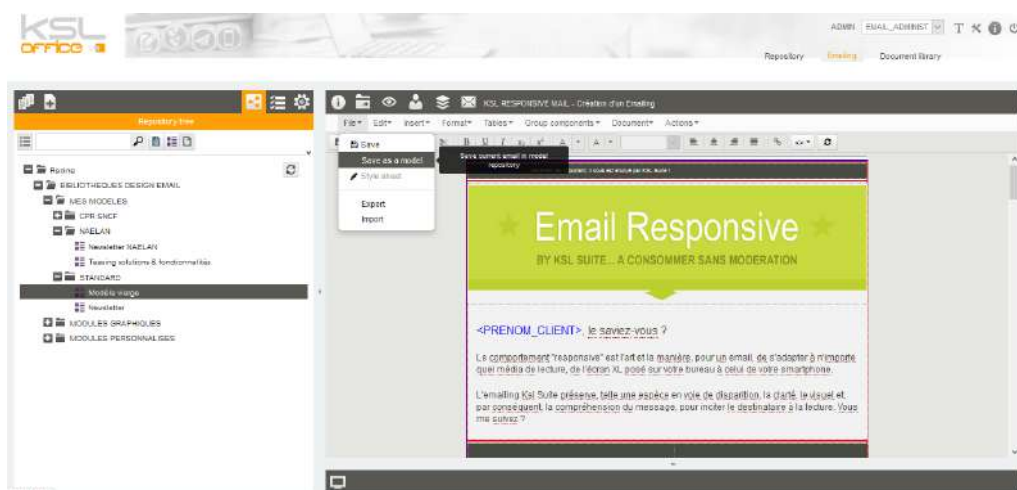
when previewing the emailing or sending it

Basic rules:

- `<COMP_NEWS>` must correspond to a column of the recipient list
- This column can be personalized to each recipient
- Whatever its value, this text added to the URL, must correspond to an existing URL in order for the user to use it

5.8. Create a new model from an emailing

In the menu, select File then Save as a model



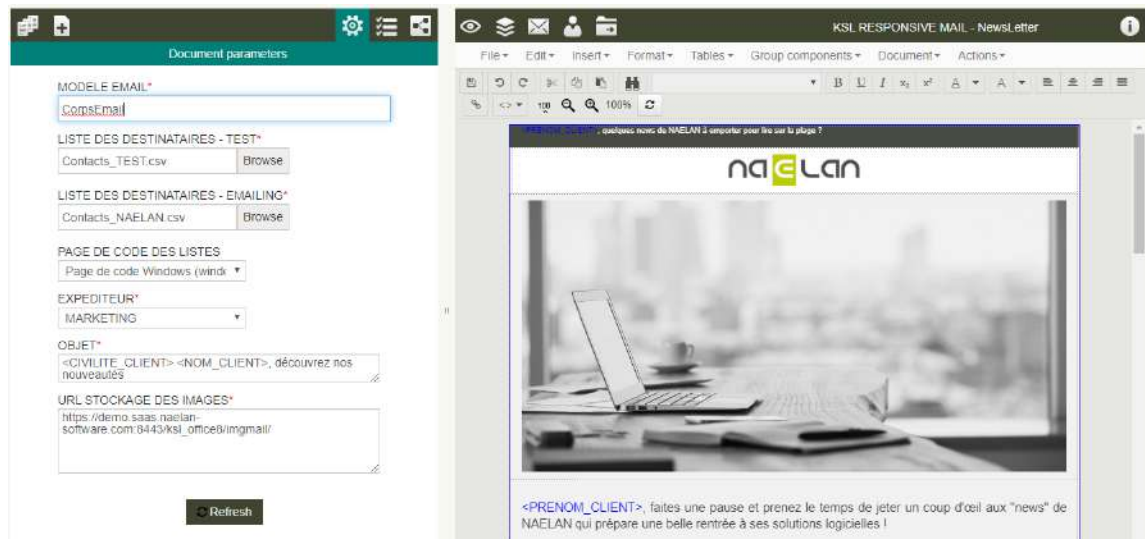
Have you found the ideal structure for your newsletter? Have you defined the content of order confirmations? You can save the current email as a new model in the repository.


Name the new model and select its storage branch in the classification tree (e.g. My Models). The branch must belong to the root configured to be available in the emailing view so that the model be used when

creating a new email.

i The new model is stored as a "group" object and can be used for correction or update directly in the library management, within the resource repository.

5.9. Modify launching parameters



Select the "Document parameter" button  on the top banner, to access and modify the parameters of the emailing campaign.

i It is necessary to Refresh the document when the parameters are modified to take into account the new parameter values.

6. Preview the Email body

6.1. A data-driven HTML preview



The "Preview" action is available in the list of emailing actions.

It uses a specific service that builds the mail body in responsive html and replace the variable with the data field of the first line of the recipient list (see "Create and set-up an emailing").

The result is an html preview of the mail body, whose variables are personalized by the data file and directly opened in a new tab of the browser (below, variables are surrounded in green).

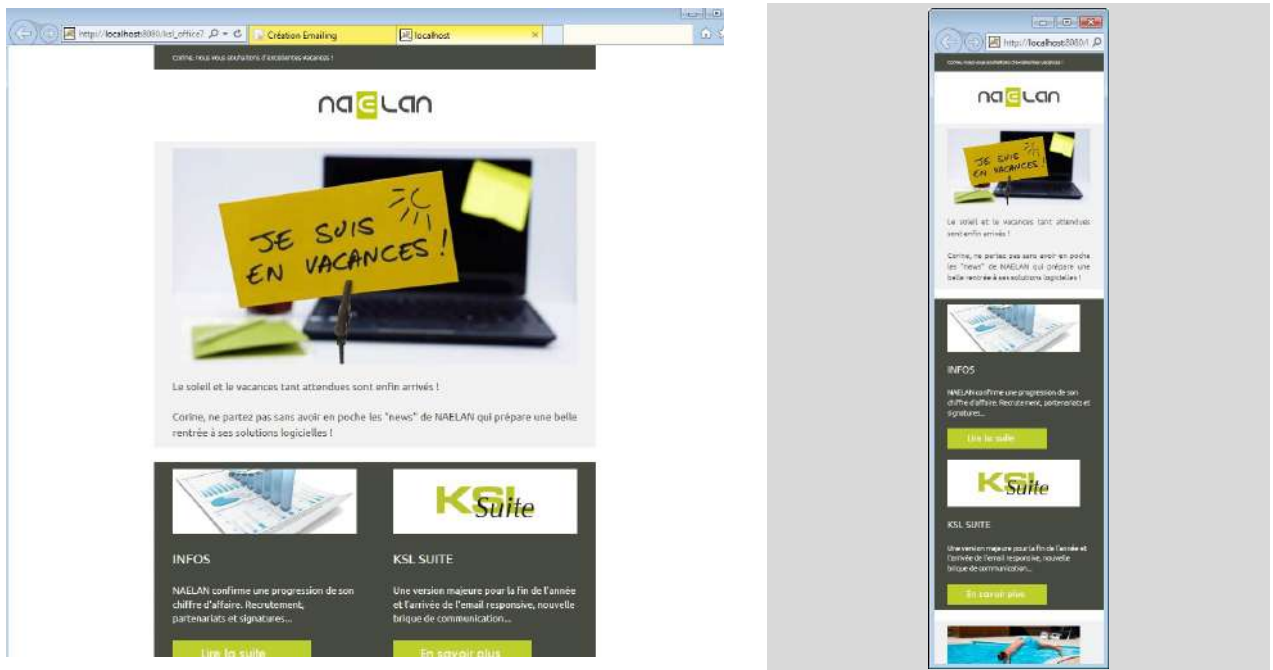


The valuation extracts the first contact from the file associated with the emailing campaign and integrates it into the design of the email. This allows to test instantly the correspondence between the file columns and the variables inserted in the email. It therefore allows, if necessary, an immediate correction of the contact list or the email body.

Access to the images

The preview is also an opportunity to test the availability of images in the preset URL in the settings. It validates their possible download from a customer's device.

6.2. Simulate the responsive behavior



To simulate and test the Responsive behavior, simply reduce the size of the browser window to see the reorganization of the body of the email on a smaller reading media. Responsive behavior will instantly adapt components to the new screen size.

6.3. Test hyperlinks

The HTML preview allows to test the hyperlinks associated to images or texts in the body of email. The content of the link appears when positioning the mouse over an hyperlink. Click on the object to follow the URL.



7. Standard actions: test, send and archive

7.1. Actions and permissions

A set of actions is predefined for emailing but not all the groups are permitted by default to use them. Of course the default permission described below can be completely change to cover other needs.

All the users can:

- Access to the email information, mainly the campaign name (which can be modified) and a comment
- Preview the responsive email body (cf. previous chapter)
- Send for test

The ADMIN group (administrators) has additional permission: a user of this group can apply the whole emailing campaign process, from the design of a campaign, its test, delivering and archiving. The possible action buttons are presented below:



The USER group (emailing designers) cannot send a campaign without a validation. On the design step, the users of this group can only send the emailing to validation.

The VALIDATOR group (validators) can access the emailing "to be validated" in its Archive view and apply two actions via its web interface: preview and send for test. Indeed, its validation actions inform the USER that its campaign can then effectively sent and archived.

7.2. Testing an emailing campaign



Select the button "Document parameters" on the top menu at the left, and check the different parameters:

- The recipient list for tests
- The recipient list of the campaign
- The object of the message
- The sender

The action "Test the Emailing Campaign" allows to deliver the emailing to recipients if the testing list, under the same conditions of the emailing campaign.

This test can be launched on different sets of files; simply select a new list of recipients in the parameters and refresh the emailing to validate this change.

7.3. Send an emailing campaign to a recipient list

The checks described above, are of course always valid.



The email is then forwarded to the recipient list associated with the campaign in the parameters.

i An emailing campaign can also be sent asynchronously from an external business application (via a web service for example), but in this case, the campaign must be archived before.

7.4. Archive a campaign



The archiving of an emailing allows to archive a campaign.

The campaign can of course be still accessed and copied, for example to create a new similar campaign.

7.5. Send a campaign to validation



If a validation is necessary and if a Ksl document validation workflow is already implemented, the emailing can use workflow, before it is effectively sent and then archived.

i Campaign sending and workflow actions are never presented simultaneously because a user:

- Either has permissions to deliver and archive campaign
- Or has permissions to transmit his campaign to another user for validation; in this case, the two actions of sending and archiving are not available only at the end of the process, when the campaign is validated.

8. Integrate emailing in a document process

8.1. Validation workflow

Role identification

Two user groups: EMAIL_USER and EMAIL_VALIDATOR

- The EMAIL_USER group is associated to emailing designer; these users will also send and archive emailing after validation
- The EMAIL_VALIDATOR group is associated to emailing validation; they can also modify the communication.

Timeline of actions

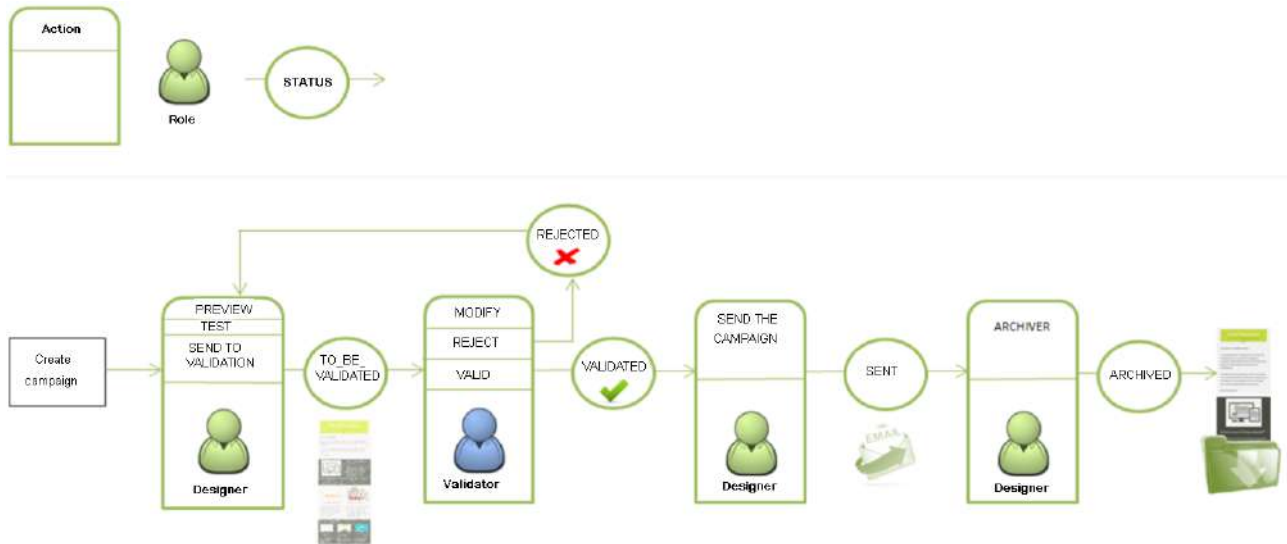
- 1) The designer creates an emailing in the interactive application; he can preview the body of emails, test the emailing with test recipient list, and send its campaign to a validator.
- 2) The validator accesses to the campaign in its "To be validated" archive view; he can modify the campaign, preview it for test, reject or validate it after adding a comment. In the two validation action, the campaign est is returned to the designer.
- 3a) If the campaign is rejected, the designer applies modifications and submit it a second time to validation > return to step 2)
or
- 3b) If the campaign is validated, the designer can send its emailing
- 4) The designer archives its campaign
- 5) The archived campaign is shared and can be view and use by another designers

Document types and properties

EMAIL_WORKFLOW : document type of an emailing campaign during its workflow process. The "status" properties allows to follow the campaign in the workflow; the different status are the following: TO_BE_VALIDATED, VALIDATED, REJECTED, ARCHIVES.

CAMPAGNE_EMAILING (Emailing campaign): document type of an emailing archived campaign; this type is associated to the status "ARCHIVE" (archived).

Business process schema



i The workflow provided can be fully adapted to the existing user profiles and to the internal processes.

8.2. Copy an emailing campaign

It can be useful and easier to select an archived campaign in order to create a new campaign and then get its personalization.

The copy is a possible action on archived campaigns, and can be given to users according to permissions.

Click on the chosen campaign in the Archie view:

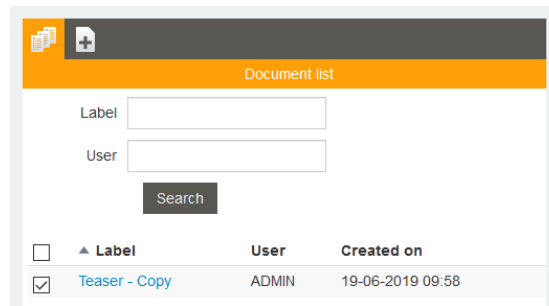



In the information details of the campaign, click on "COPY":

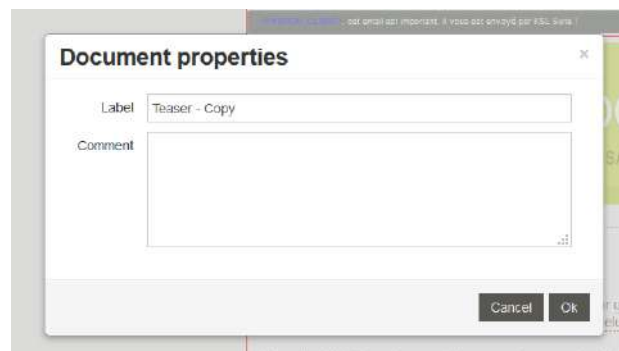


The selected campaign, the email body and all its parameters, will be copied and moved in the current document view of Emailing tab. The name of this new campaign will be the name of the source campaign

with the suffix "copy"



Click on the pencil to edit and customize the copy. The document's properties will allow to change the name of this copy: menu Document > Properties or icon .



8.3. Delete an archived campaign

The deletion of a campaign is possible but subject to permissions; the administrator can be the only one empowered to delete this document. The action button "DELETE" is then available on the campaign details for this user profile.



Deletion is an action that can also be set up in the list of archived campaign for possible multi-selection.

8.4. Send an emailing campaign from an external application

On the existing project, a validated emailing campaign can be sent directly from the KSL Office workflow. But it is also possible to launch an archived email campaign from an external application (via web services for example) with a new list of recipients as a parameter.

The AR_EmailingBatch service allows to launch an archived campaign with the following parameters:

- P_DocumentName: name of the archived campaign
- P_MailCsvFile: recipient filename with its path in .csv format (dynamic new recipient list). The structure of this file must have the same format as the one defined for the campaign.



NAELAN
Bureau de Lyon
4 rue Claude Chappe
69370 Saint-Didier au Mont d'Or
Tél. +33 (0)4 37 59 81 40

Bureau de Paris
4 Place Louis Armand
75023 Paris
Tél. +33 (0)1 72 76 80 86

www.naelan.com