SQLWorks

Title of document	How to use the design window and formatting tools
Author	Naomi Joachim
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Purpose

This procedure explains how to use the various editing tools available on the design window for sending emails including the formatting palette.

Scope

This procedure applies to all Lineal Software Solutions staff, as well as any prospective customers or clients who intend to utilise SQLWorks within their business environment. The procedure is aimed at all users, who will be operating the SQLWorks client.

Change History:

| Date	Version	Created by	Description of change	Approved by
24.10.22	1	Naomi Joachim		Will Adkin

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Design window

The design window is available to all users and opens for editing when a new email is created in SQLWorks. If design templates have been created and saved to the email type; these will be available to choose from, otherwise a blank window will appear for the user to create their own email design. Any edited template or newly created email design can be saved as a template to be used in the future.

Editing email templates

If you are an admin user, templates can be found in SQLWorks Prefs on the 'Email' tab in the top section on the right, and then 'Email Settings'. For non-admin users, when sending an email generated from within SQLWorks, you will either be presented with a blank design window, or a prefilled email template if one has been created for that email type being sent. For help on how to create templates as an admin user please see our How to create email templates guide.
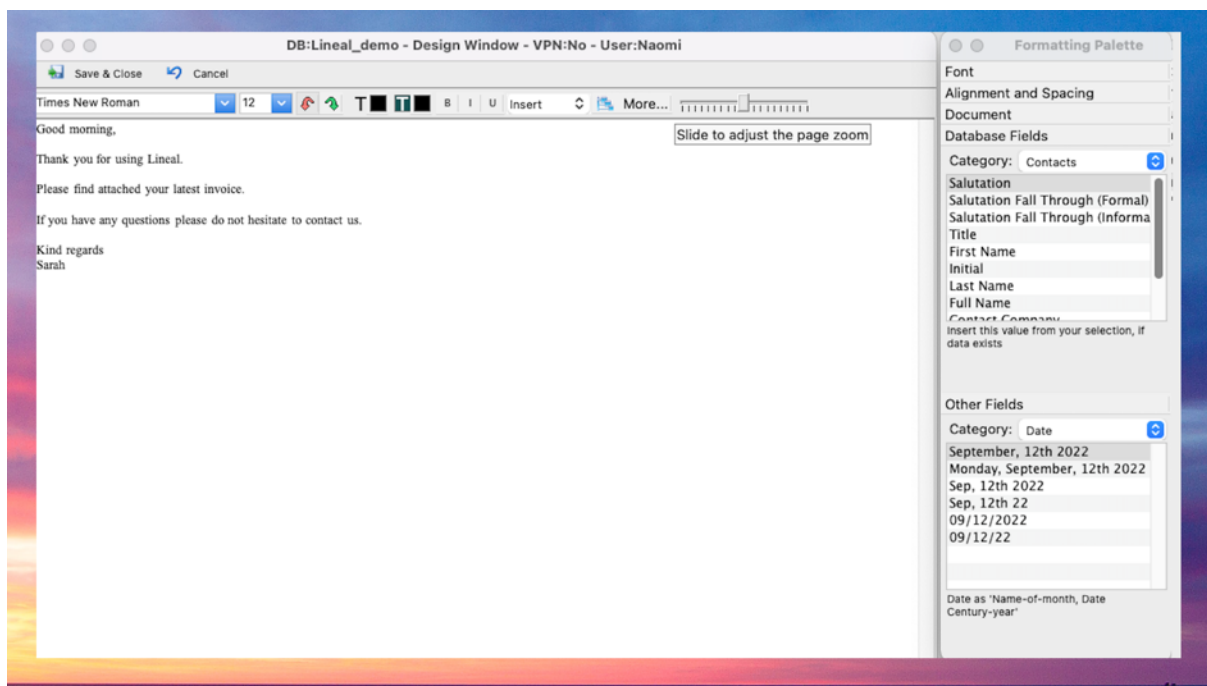
1. The email template above is an example of how the design window may look.

2. Across the top are some familiar text editing tools as well as the option to insert additional features such as images. Standard feature set includes font selection, font size, a redo and undo arrow, text colour and text highlight, and Bold, Italic and underline options.
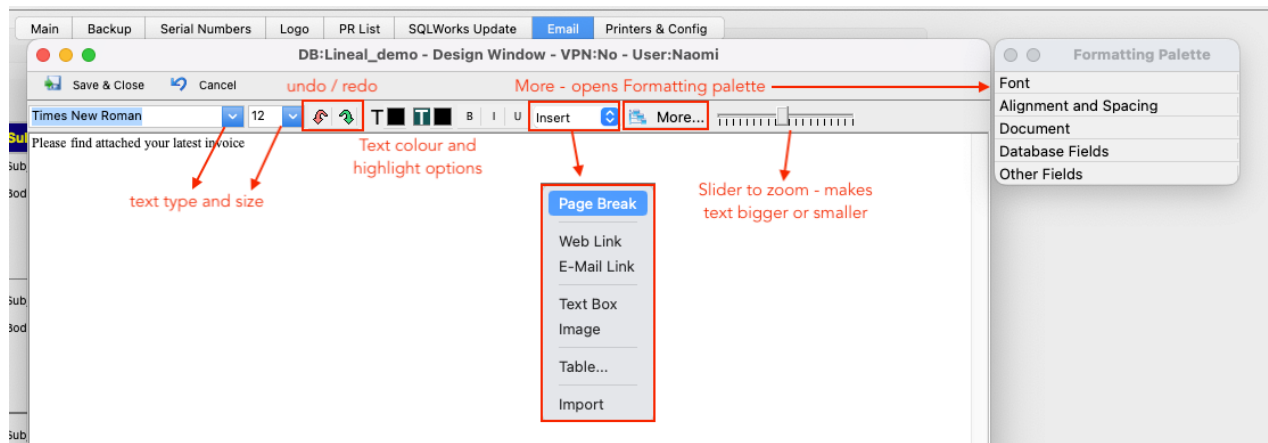
3. To assist with the layout of your email you can choose to insert images, tables, text boxes, email or web links directly.


These options can be selected from the 'Insert' dropdown. Once added into the design window you can make changes and control these via the right click dropdown menu. The right click options have some generic editing options such as font and paragraph spacing, but there is also formatting options specific to the object inserted.

You can amend the layout, size etc. and for images, you can insert a clickable link to direct your recipients to a web page or alternative location from the email itself.

4. There are some additional tools in the formatting palette to the right – if not open by default this can be opened using the 'More' button. There is also a zoom slider to make the text bigger or smaller, to ease editing.

5. Although some templates will have been created and can be used as they are, if for any reason a template is edited or a new template created - on the email window you can right click on the template selection to add the current template as a new template. It will save for whatever type of email is being worked on at that time.

Formatting Palette

SQLWorks has cleverly incorporated a design editing pop out palette with multiple editing fields. This formatting palette can be accessed via the 'More' button if it is not open by default.
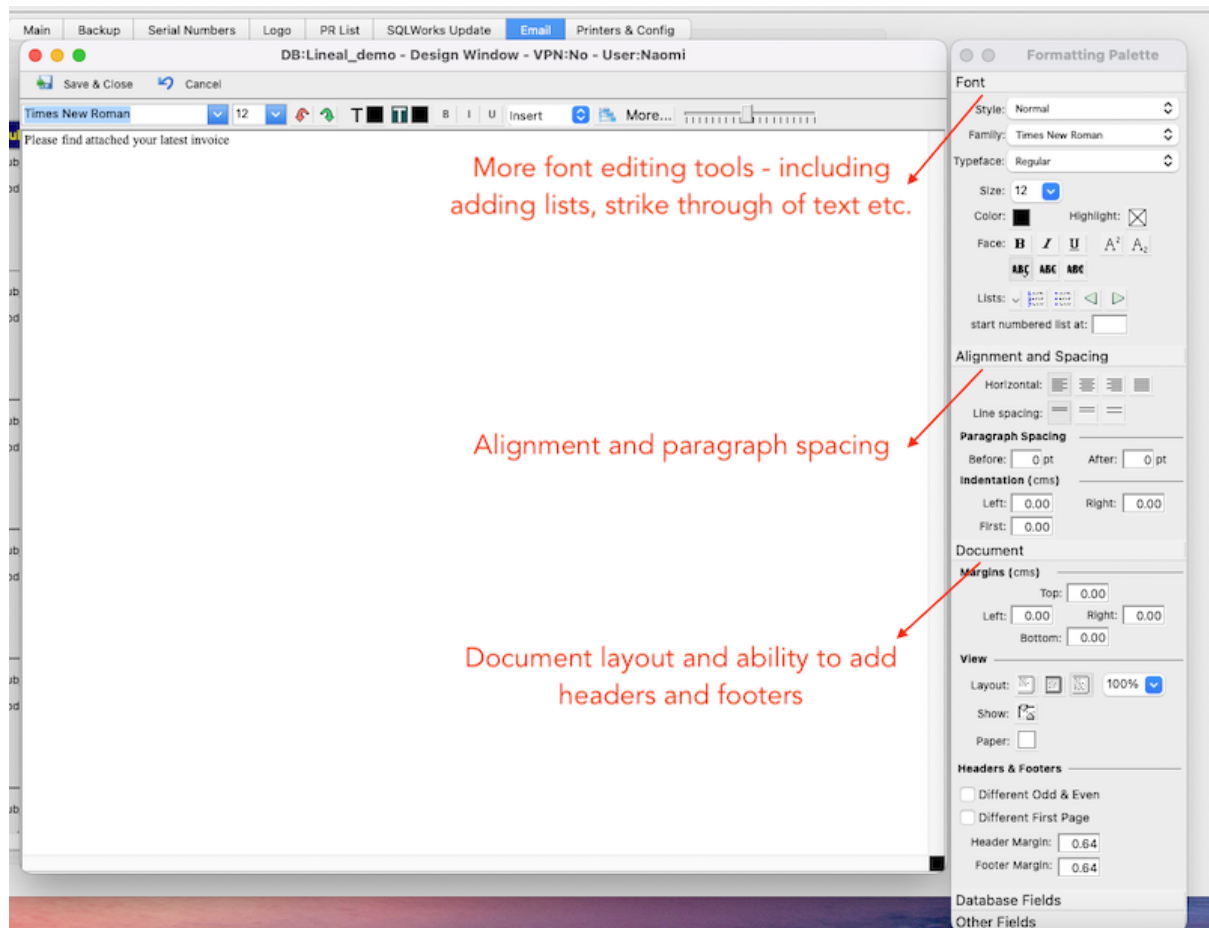

The fields are expandable in the palette and as per the image above the top 3 sections are extensions of the tools available on the top tool bar.

Some of these controls will not necessarily be needed much in day-to-day email templates, but the ability to create formatted document layouts may be useful for tailored emails and even marketing campaigns or sharing important formal information.
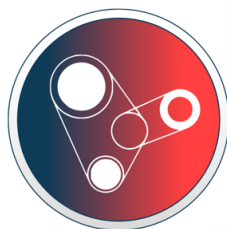
To really utilise the integration that SQLWorks has to offer, the formatting palette also includes a Database Fields section which allows the user to insert tags into the main email body so that each email contains mail merged custom data from elsewhere in the system.

As can be seen in the image below there are various types of Database field available to choose from. These options adjust according to the type of email being sent or where the email was opened from. For example 'Sales Accounts' would only be a category option if the email is sales ledger focused.
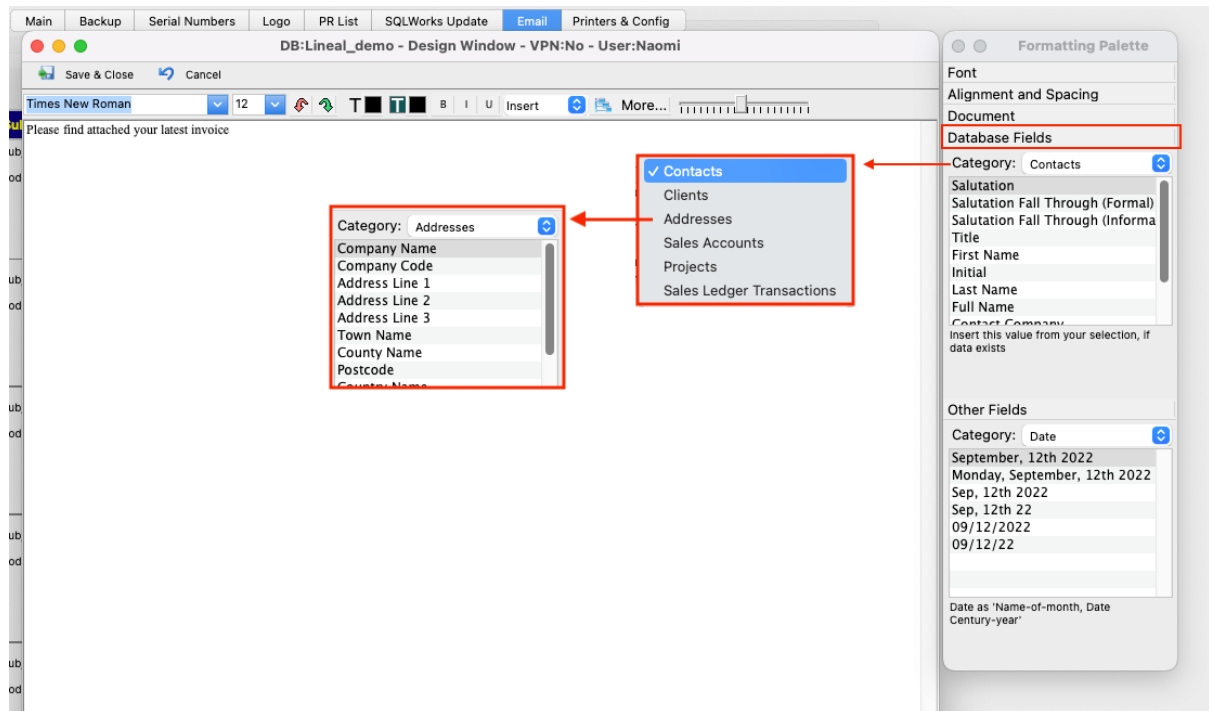
The dropdown Category list can be selected, and subsequent and relatable options become available to input into the email. This will automatically pull in the relevant information from other areas in the system - for instance contact information in the correct format, sales order numbers or invoice amounts.

As shown in the example above if Addresses was selected as the Category, there are a number of address related entries that then become available to be incorporated into the email with a double click. There are additional options, such as the date in the Other Fields section below.