NewgenONE OmniOMS

Communication Designer

User Guide

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Disclaimer

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Contents

Preface

This section provides information about this guide, details on the intended audience, revision history, and related documentation for this guide.

Revision history

Revision date	Description
October 2024	Initial publication

About this guide

This guide explains creating and designing communication templates using a low-code method. It also explains how to use the Communication Designer and its supported features with meaningful business use cases. This guide provides step-by-step procedures for creating different types of templates in the designer. Furthermore, this guide also contains the configuration details of each control you can add to each template.

To ensure you are referring to the latest and most recent revision of this guide, download it from one of the following locations:

- Newgen Internal Doc Portal, if you are a Newgen employee.
- Newgen Partner Portal, if you are a Newgen partner.

Intended audience

This guide is intended for system administrators, developers, and all other users who seek information on the functioning of the various features of OmniOMS Communication Designer and aid them in configuration, maintenance, and development. The reader must be comfortable in understanding the computer terminology.

Related documents

Following documents provide additional information about OmniOMS Communication Designer:

- NewgenONE OmniOMS Installation and Configuration Guide
- NewgenONE OmniOMS Admin Workspace User Guide
- NewgenONE OmniOMS Interactive Editor Integration User Guide
- NewgenONE OmniOMS Developer Guide

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- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

Introduction

OmniOMS Communication Designer is a user-friendly tool that empowers organizations to design and publish professional communications quickly and effortlessly, without requiring any coding skills. With its intuitive drag-and-drop interface, users can create visually appealing and responsive emails and attachments (PDF and Word format), SMS, WhatsApp messages, and social communications with ease.

Communication Designer's extensive toolbar provides a wide range of options to enhance communication designs. Users can easily incorporate images, text, bar and QR codes, shapes, digital signatures, watermarks, tables, buttons, videos, password configurations, annexures, and more. It supports the integration of customer data in JSON and XML formats, enabling seamless mapping to the templates. Additionally, version management ensures efficient management of templates throughout the design process.

Following are the main steps involved in creating and publishing a communication template in the OmniOMS Communication Designer.

Related topic(s)

- Getting started
- OmniOMS Communication Designer elements
- Tutorials

Getting started

This chapter gives you an overview of getting started with OmniOMS Communication Designer. It includes the following topics:

- Signing in to OmniOMS Communication Designer
- Exploring OmniOMS Communication Designer interface
- OmniOMS Communication Designer elements

Signing in to OmniOMS Communication Designer

To sign in to OmniOMS Communication Designer, follow the below steps:

1. Open a web browser.
2. In the browser address bar, enter the OmniOMS Communication Designer URL in the following format:
   http://<ip_address>:<port_number>/omniomscommdesigner/#/login
   Where, *<ip_address>* signifies the Internet Protocol (IP) address of the machine where the OmniOMS server is running, and *<port_number>* signifies the port number of the OmniOMS server.
   For example, *http://127.0.0.1:6060/omniomscommdesigner/#/login*
   The OmniOMS sign-in page appears.

   - In case Single Sign-On authentication is enabled, then use the following Communication Designer URL:
     https://<ip_address>:<port_number>/newgensso/omniomscommdesigner
   - In case multitenancy functionality is enabled, then use the following Communication Designer URL:
     https://<ip_address>:<port_number>/omniomscommdesigner/#/login?cabinetname=<cabinetname>
     For detailed access-related information, refer to the Accessing Admin Workspace section in the *NewgenONE Admin Workspace User Guide*.

3. Enter the following details in the corresponding fields:

Field	Description
Name	Enter your username.
Password	Enter the password associated with your username.
Cabinet	Select a suitable cabinet from the dropdown list. A cabinet within OmniOMS is a centralized unit of data storage that encompasses tables crucial for the functioning of the system within the database. Multiple cabinets can coexist within a single database server. Conceptually, a cabinet parallels a database within the database server, encapsulating essential tables and data structures specific to OmniOMS. This field does not appear in case the multi-tenancy functionality is enabled.
Remember me	Select to preserve your sign-in details.

4. Click **Login** to proceed further.
5. *(Optional)* Enter the one-time password (OTP) received on your registered email or mobile, and then click **Verify**. The Communication Designer home page appears.

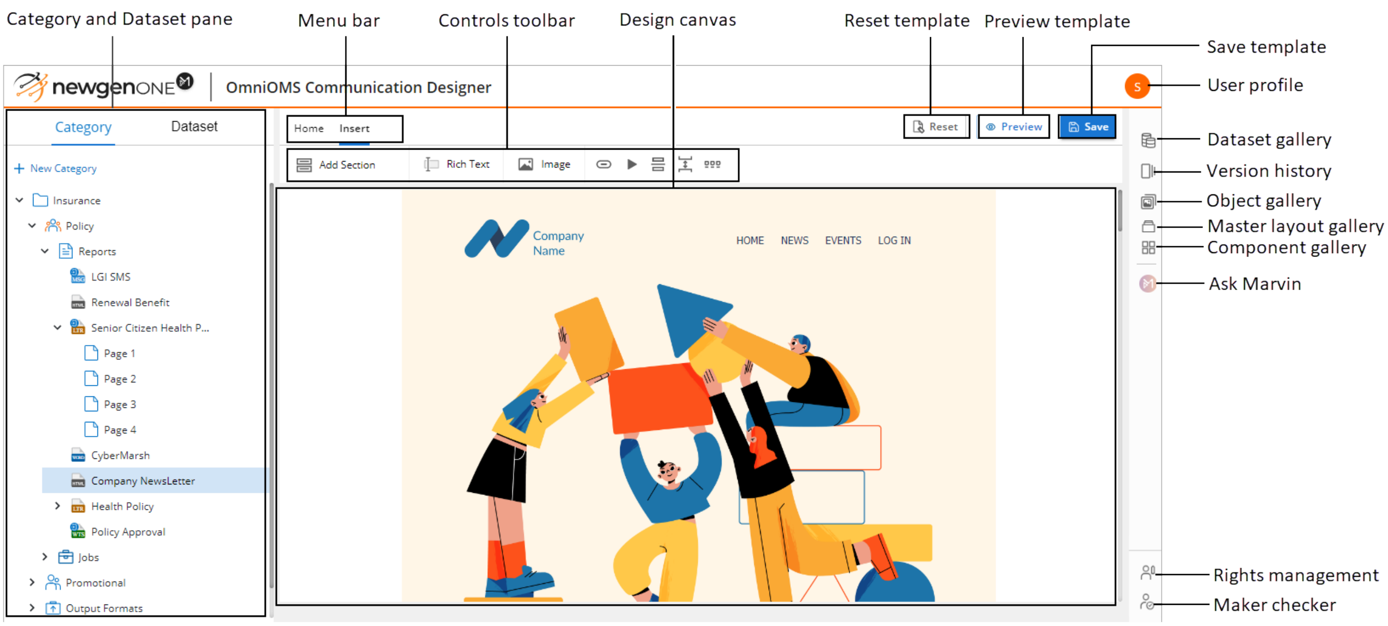
- You are prompted to enter the OTP only if Two Factor Authentication is enabled in the Admin Workspace. For more information, see **NewgenONE OmniOMS Admin Workspace User Guide**. In case you received no OTP, then click **Resend OTP**.
- If the used volume exceeds double the total allocated volume, a popup message appears indicating that the license has expired.

Related topic(s)

- Exploring OmniOMS Communication Designer interface
- OmniOMS Communication Designer elements

Exploring OmniOMS Communication Designer interface

On successful sign-in, the Communication Designer home page appears. On the home page, you can see Categories and Dataset panes on the left. While, the pane on the right gives you options to connect the communication group or template with a dataset, view the version history of a template, and add static images and texts to the template.



The home page of the Communication Designer includes the following user interface (UI) elements:

UI element	Description
Category and Dataset pane	• The Category pane displays the different categories created in the selected cabinet. You can expand the category to view its corresponding communication groups, templates, and jobs. • The Dataset pane shows the different datasets created in the selected cabinet. You can expand the dataset to view its corresponding fields.
Menu bar	It consists of Home, Insert, and Align menus.
Toolbar	It contains tools for creating templates such as tables, images, texts, buttons, hyperlinks, and others.

UI element	Description
Design canvas	It is the area where you can design templates for communication.
Reset template	It allows you to clear the existing content from the template.
Preview template	It allows you to preview the template.
Save template	It allows to save the changes made to a template.
Dataset gallery	It lists the different datasets created in the selected cabinet. Using the dataset gallery, you can link a communication group or template with the required dataset.
Version history	It lets you view the version history of the template that indicates the number of changes made to it.
Object gallery	It is a collection of static objects that allows you to insert static images and text across the templates. You can simply drag and drop the object into the design canvas.
Master layout gallery	The master layout gallery is a collection of local and enterprise (or global) master layouts in the currently signed-in cabinet.
Component gallery	The component gallery is a collection of local and enterprise (or global) components in the currently signed-in cabinet.
Ask Marvin	It allows you to generate creative content using generative AI (Artificial Intelligence) based on your requirements. For more information, see Generating content with NewgenONE Marvin. The NewgenONE Marvin logo and Ask Marvin icon only appear if it is registered and configured in the Others and Marvin tab of Admin Workspace. For more information, refer to *NewgenONE OmniOMS Admin Workspace User Guide*.
Rights management	It allows you to assign rights to users or user groups and then view those rights. These access rights include permissions to view, create, edit, and enable the maker checker for categories, enterprise master templates, and enterprise components. For more information, see Managing user rights.
Maker checker	It allows you to accept or reject the approval requests received for baselining the templates and components (both local and global). Additionally, you can view your sent approval requests. For more information, see Managing approval requests.
User profile	It allows you to view your sign-in details such as name, cabinet, last login details, and failed attempts.

On the interface, you can also see the Undo or Redo icons for reversing or repeating the actions in a template.

The Undo or Redo icons are not available for email templates.

Related topic(s)

- Adding a category
- Adding a dataset
- Adding controls
- Working with object gallery
- Working with master layout gallery

OmniOMS Communication Designer elements

These are the basic elements of the OmniOMS Communication Designer arranged in a hierarchical order:

- **Category** — It acts as folder segregation to organize similar types of communications. For example, you can add different categories to manage mutual funds and loan communications.
  When you add a category, an Output Formats folder is created by default. Furthermore, there can be multiple communication groups within a category. For more information on categories, see Adding a category.
- **Communication Group** — It acts as a package for communications. In OmniOMS Communication Designer, you can add two types of communication groups: For more information on communication types, see Adding a communication group.
  It is within a communication group where you can define templates and jobs.
  - Common dataset communication group
  - Mixed dataset communication group
- **Template** — It is the template that outlines the design of your communication. In OmniOMS Communication Designer, you can create email, message, and WhatsApp templates.

- **Job** — It is a set of configuration settings that instructs the production server for generation purposes. OmniOMS Communication Designer allows you to create the following on-demand jobs:
    - On-demand message/WhatsApp job
    - On-demand mail/archival job

  For more information, see Working with jobs.
- **Output Formats** — It denotes the output format for the email attachment. The supported output formats are PDF or DOC/DOCX.

Related topic(s)

- Adding a category
- Adding a communication group
- Working with templates
- Working with jobs
- Defining an output format

Adding a dataset

A dataset is a set of related data nodes (tables or tags) that contains dynamic information for creating personalized templates. Before mapping the data in the communication template, you must first connect the communication group or template with the dataset.

OmniOMS Communication Designer allows you to connect with an XML dataset (XSD) or JSON dataset, and support various dataset operations like check in, check out, undo check out, update, rename, delete, and others.

Related topic(s)

- Adding a JSON dataset
- Adding an XSD dataset

Adding a JSON dataset

To add a JSON dataset, follow the below steps:

1. On the home page, navigate to the **Dataset** pane on the left.
2. Click **+ New Dataset**, and then select **JSON Dataset**.
   The New JSON Dataset dialog appears.
3. Click the horizontal ellipsis icon ••• to browse a JSON file on your local system.
   The Open dialog appears.
4. Navigate to the required folder on your system, and choose the required JSON file.
5. Click **Open**, and then click **Add**.
   The JSON dataset gets added and appears under the Dataset list.

   It is important to check in the dataset to link it with the required communication group or template. For procedural details, see Checking in a dataset.

Adding an XSD dataset

To add an XSD dataset, follow the below steps:

1. On the home page, navigate to the **Dataset** pane on the left.
2. Click **+ New Dataset**, and then select **XSD Dataset**.
   The New XSD Dataset dialog appears.
3. Click the horizontal ellipsis icon ••• to browse an XSD file on your local system.
   The Open dialog appears.
4. Navigate to the required folder on your system, and choose the required XSD file.
5. Click **Open**, and then click **Add**.
   The XSD dataset gets added and appears under the Dataset list.

> It is important to check in the dataset to link it with the required communication group or template. For procedural details, see Checking in a dataset.

Related topic(s)

Checking in a template

Creating a custom dataset

Communication Designer allows you to create a dataset schema that you can link with the template or communication group. JSON and XSD are the different schemas you can create in the Communication Designer. A schema defines the structure of the JSON or XSD dataset. It describes the different types of fields in the dataset with their data types.

To create a custom dataset, follow the below steps:

1. On the home page, navigate to the **Dataset** pane on the left.
2. Click **+ New Dataset**, and then select **Custom Dataset** from the list.
3. Select the required dataset type from the list. The dataset can either be XSD or JSON.
   The Create New Dataset dialog appears. Here you can define the data fields and their data types, add sample data for the fields, and set the fields as arrays.

By default, a root node is already added in the dataset with the variable name RootNode and type as Object. Here, the data type Object means that the variable can contain child variables. However, you can modify the variable name of the root node.

By default, the Type, Sample Data, and Array fields are disabled for the root node.

4. Enter the name of the variable.
5. Set the data type of the variable. It can be an object, integer, long, double, float, string, Boolean, and date.
6. Enter the sample data for the data field.

You can enter the sample data based on the chosen data type.

7. Select the **Array** checkbox to set the variable as an array. It means the variable can contain multiple values. For example, an Employee_Phone variable can be set to an array variable. This is because an employee can have more than one phone number.
8. Click **Add** to add the variable.
9. To add more variables, repeat steps from 4 to 8. You can perform the following operations on the added variables:
   - To delete the added variable, hover over the variable and then click **Delete** .
   - To change the sequence of the added variables, drag and drop the required variable to the desired location.
10. Click **Create**.
    The custom dataset gets created and appears in the Dataset pane.

- It is necessary to check in the dataset to link it with the required communication group or template. For procedural details, see Checking in dataset.
- You can download a custom dataset file to preview a template with sample dataset values. For more information, see Downloading a custom dataset file.

Checking out a dataset

Check out a dataset to make changes to it.

To check out a dataset, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** ••• and then select **Check Out** from the list.
   The dataset gets checked out.

   In case you want to undo a checkout, then click **More Options** ••• and select **Undo Check out** option from the list.

Related topic(s)

- Setting dataset field type
- Setting display name
- Securing fields

Checking in a dataset

When you first add a dataset, you must check in to link it with the required communication group or template. Also, when you make changes to the dataset, you need to check in the process to save the changes.

To check in a dataset, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** ••• and then select **Check in** from the list.
   The Dataset Checkin dialog appears.

   If you are checking in the document for the first time, the **Check in Version** is set to 1.
3. Enter the comment in the space provided.
4. Click **OK** to confirm.

Related topic(s)

- Linking communication group with a dataset
- Linking template with a dataset

Renaming a dataset

To rename a dataset, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** ••• and then select **Rename**.
3. Input the new name for the dataset, and then hit the Enter key.
   The dataset gets renamed.

Updating a dataset

To update a dataset, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** ••• and then select **Update**.
   The Update dialog appears.
3. Click the horizontal ellipsis icon ••• to browse the required JSON or XSD file on your local system.
   The Open dialog appears.
4. Navigate to the required folder on your system, and select the required file.
5. Click **Open**, and then click **Add**.
   The dataset gets updated.

Setting dataset field type

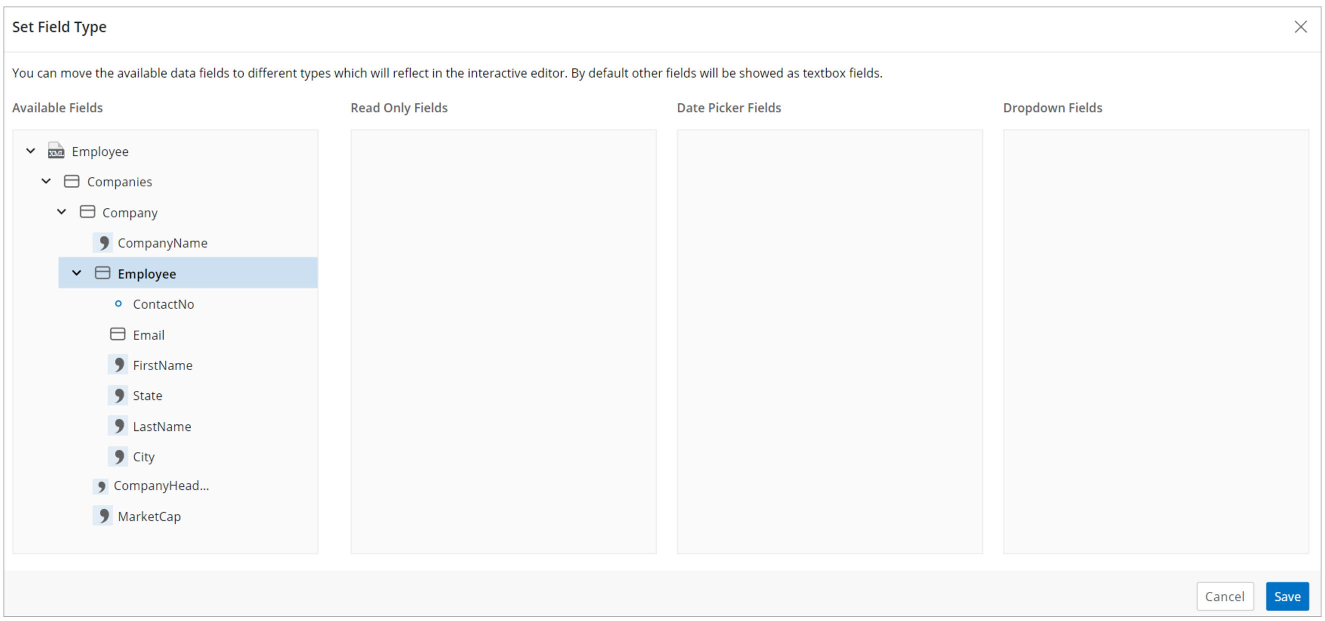
OmniOMS Communication Designer allows you to change the data type for the fields that reflect in the interactive editor used for the production server.

These are the different types of dataset fields supported in the Communication Designer:

- **Read-only** — It grants view rights on the dataset field.
- **Date-picker** — It adds a date-picker for the dataset field from where you can select a date from the calendar.
  This is applicable only to the date-type dataset fields.

- **Drop-down** — It adds a dropdown list for the dataset field from where you can select the required option. In this case, you also need to define the options.

To set the dataset field type, follow the below steps:

1. From the Dataset pane, select the required dataset.
2. Click **More Options** and then select **Dataset Field Properties** from the list.
   The Set Field Type dialog appears. It contains an Available Fields section that shows the selected dataset. You can expand the dataset to view its corresponding fields.
   

3. Hover over the dataset field and click any of the following options:
   - **Add to Read Only Fields** — Click to add the dataset field to read-only fields.
     The dataset field now appears under the Read Only Fields section.
   - **Add to Date Picker Fields** — Click to add the dataset field to the date picker fields.
     The dataset field now appears under the Date Picker Fields section.

     Only the date type field can be added to the Date Picker Field.
   - **Add to Dropdown Fields** — Click to add the dataset field to dropdown fields.
     The dataset field now appears under the Dropdown Fields section. You can now define the options to show in the dropdown list.
     To add options to the dropdown list, follow the below steps:
     i. Under the Dropdowns Fields section, click the **Menu items** icon next to the required dataset field. A Menu Items pop-up appears.

ii. Enter the name of the item, and then click **Add**.
The added item now appears under the list.
iii. *(Optional)* To add more items to the dropdown list, repeat the above steps.

4. Click **Save** to confirm.

Setting display name

OmniOMS Communication Designer allows you to set the display names for the dataset fields in the Interactive Editor.

To set the display name for the dataset field, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** ••• and then select **Set Display Name**.
The Set Display Name dialog appears. It contains a Select Table section that shows the selected dataset. You can expand the dataset to view its corresponding tables.
3. Select the required table in the dataset.
Based on the selected table, its associated dataset fields are shown on the right of the dialog.
4. Enter the display name for the required field in the space provided.
5. Click **Save** to confirm.

Viewing linked assets

When you connect a communication group or template to a dataset, it gets linked with the dataset.

To view the linked assets, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** ••• and then select **View linked assets**.
The View Linked Assets dialog appears. It displays the dataset name.
3. Select the type of linked asset. It can either be a communication group or a template.

If the dataset is not associated with any communication group or template, the list of linked assets appears blank.

- If you select the **communication group** option, a list of linked communication groups appears. The list displays the dataset version, communication group, and category.
- If you select the **template** option, a list of linked templates appears. The list displays the dataset version, template name, communication group, and category.

4. Click **Close**.

Downloading a custom dataset file

Communication Designer allows you to download a custom dataset file to view its structure. Additionally, you can download a custom dataset file to preview the template with sample dataset values. This is useful in scenarios when you do not have the required dataset file on your system to preview the template. The sample values are defined while creating a custom dataset.
For more information, see Creating a custom dataset.

To download a custom dataset file, follow the below steps:

1. On the Dataset pane, select the required custom dataset from the list.
2. Click **More Options** ••• and then select **Download** from the list.
   The custom dataset gets downloaded to your local system.

The Download option appears only for the checked-in custom datasets.

When you preview a template linked with a custom dataset, you can click the **Preview with Sample Values** button to view the template with sample dataset values.

Securing fields

OmniOMS Communication Designer allows organizations to secure their confidential information from unauthorized access, threats, and vulnerabilities. This can be achieved using the masking feature in Communication Designer that helps to create and maintain a secure workplace environment.

The masking feature is available only in the PCI-DSS cabinets.

For example, it is necessary for companies that process, store, or transmit credit card information to ensure data security and compliance.

To secure dataset fields, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** and then select **Secure Fields** from the list.
   The Secure Fields dialog appears.
3. Under the Data Fields section, expand the linked dataset and select the required dataset field you want to mask.
   The selected field automatically appears in the Field Name under the Masking Pattern section.
4. Enter the following information in the Masking Pattern section:

Property	Description
Character	Denotes a single character value that can be an alphanumeric or a special character. This character masks the required actual characters of the data field value.
Placeholder	Denotes a single character value that can be an alphanumeric or a special character. This character acts as a placeholder and its value does not get changed while masking.
Masking Pattern	Specify the masking pattern. It is a combination of entered characters and placeholders.
Variable Length Data	Select this option to enable the variable length data. This is useful in situations where the length of data field input exceeds the masking pattern length.
Apply Pattern	Select any of the following option: • **Start from left** — Select this option to apply the masking pattern from left to right. • **End to Right** — Select this option to apply the masking pattern from right to left.
Replace Others	Determines whether to keep the remaining data the same as that of the input value or replace it with the masking characters.
Sample Input	Specify the sample data input value you want to mask.

Property	Description
Preview	Click to view the data input value in the Sample Output.
Apply Pattern	Click to apply masking on the entered sample input value.
Sample Output	The resultant value appears here.

5. Click **Save**.

Deleting a dataset

To delete a dataset, you need to ensure that the dataset is in the checked-out state and all the linked assets are deleted.

You cannot roll back the delete action.

To delete a dataset, follow the below steps:

1. On the Dataset pane, select the required dataset from the list.
2. Click **More Options** ••• and then select **Delete**.
   The Delete Dataset dialog appears.
3. Click **Delete** to confirm.
   The dataset no longer appears in the Dataset pane.

Adding a category

The purpose of creating a category is to group similar types of communications for easy access.

To add a category, follow the below steps:

1. On the Home page, go to the **Category** pane.
2. Click **+ New Category**.
   The category gets added and appears in the Categories list.
   By default, the created category contains an Output Formats folder.

Related topic(s)

- Renaming a category
- Deleting a category

Renaming a category

To rename a category, follow the below steps:

1. On the Category pane, select the required category from the list.
2. Click **More Options** ••• and then select **Rename**.
3. Input the new name for the category, and then hit the Enter key.
   The category gets renamed.

Deleting a category

To delete a category, you need to ensure it does not contain any communication groups, templates, or jobs.

> You cannot roll back the delete action.

To delete a category, follow the basic steps:

1. On the Category pane, select the required category from the list.
2. Click **More Options** ••• and then select **Delete**.
   The Delete Dataset dialog appears.
3. Click **Delete** to confirm.
   The category no longer appears in the Category tab.

Adding a communication group

There are two types of communication groups you can create in the Communication Designer:

- **Common Dataset Communication Group** — In this type, the communication group uses a common dataset for designing and previewing templates. It means, all the templates within the specified communication group use the same dataset. Here, you need to link the communication group with a dataset. For more information, see Linking communication group with a dataset.
- **Mixed Dataset Communication Group** — In this type, each template within the communication group uses its own dataset. It means you need to link each template with the required dataset in this type of communication group. For more information, see Linking template with a dataset.

A category can contain both types of communication groups.

To create a communication group, follow the below steps:

1. On the Category pane, select the required category from the list.
2. Click the **New Communication Group** icon.
3. Select any of the following options:
    - Select the **Common Dataset CG** option to create a common dataset communication group.
    - Select the **Mixed Dataset CG** option to create a mixed dataset communication group.

   The communication group gets added. A common dataset communication group is represented by icon while a mixed dataset communication group is represented by icon. You can further link the common dataset communication group with a dataset. However, in the case of a mixed dataset communication group, you need to add templates first and then bind them with the required datasets.

Related topic(s)

- Linking communication group with a dataset
- Linking template with a dataset
- Deleting a communication group

Linking communication group with a dataset

To add data to your template, you need to link the communication group with a dataset.

This is applicable only in the case of a common dataset communication group. This is because all the templates within this communication group share a common dataset.

To link the communication group with a dataset, follow the below steps:

1. From the Categories pane, select the required communication group.
2. On the right, select the Datasets Gallery. It lists all the datasets added in the selected cabinet.
3. Select the required dataset from the list.
4. Click **Link with Communication Group**.
   The communication group gets now linked with the dataset.

Related topic(s)

Adding a template

Renaming a communication group

To rename a communication group, follow the below steps:

1. On the Category pane, expand the required category from the list and select the communication group.
2. Click **More Options** ••• and then select **Rename**.

3. Input the new name for the communication group, and then hit the Enter key.
   The communication group gets renamed.

Deleting a communication group

To delete a communication group, you need to ensure it does not contain templates or jobs.

> You cannot roll back the delete action.

To delete a category, follow the basic steps:

1. On the Category pane, expand the required category from the list and then select the communication group.
2. Click **More Options** ••• and then select **Delete**.
   The Delete Dataset dialog appears.
3. Click **Delete** to confirm.
   The communication group no longer appears under the respective category.

Working with templates

In OmniOMS Communication Designer, you have access to a variety of templates for designing email, message, and WhatsApp communications. Furthermore, you can create custom templates for PDF or Word documents and include them as attachments in your email communications. The intuitive design process involves easily dragging and dropping controls from the Controls toolbar to create your desired communication layout.

OmniOMS Communication Designer provides support for creating and associating rules with specific controls. It also allows you to copy the template to a different communication group, view the version history of the template, view and set its configuration settings, and others.

Related topic(s)

- Adding a template
- Linking template with a dataset

Adding a template

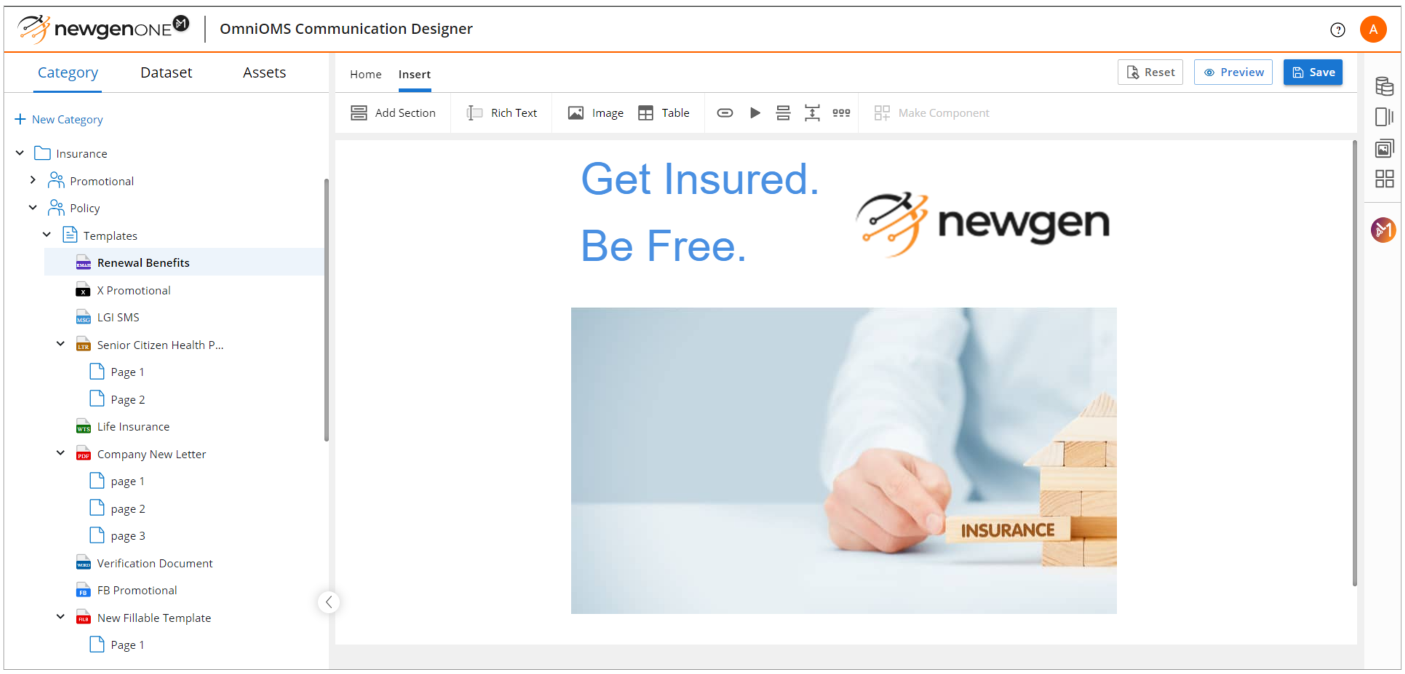
This chapter describes the basics of adding templates in the OmniOMS Communication Designer. It consists of the following topics:

- Creating an email template
- Creating a message template
- Creating a WhatsApp template
- Creating a letter template
- Creating a design on pdf template
- Creating a Word template
- Creating a fillable PDF template
- Creating an X template
- Creating a Facebook template

Adding an email template

Use the email template to design an email communication. You can send email communications to share quick messages with customers, employees, and coworkers. These messages can contain text, images, videos, buttons, and thumbnail icons.

For example, Insurance companies can send reminders about policy renewal to their customers.



To add an email template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon + and then select **Email Template** from the list.

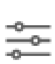
The menu bar of the email template contains the following menu options:

- Home menu
- Insert menu

Home menu

The File menu consists of a formatting toolbar that provides various formatting options to modify the font size and color, alignment, and formatting style.

The below table describes the different formatting options available in the formatting toolbar.

Icon	Icon Name	Description
Body Font	Font style	Change the font style of the selected text.
12	Font Size	Change the font size of the selected text.
B	Bold	Bold the selected text.
I	Italics	Make the selected text italics.
U	Underline	Underline the selected text.
~~abc~~	Strikethrough	Strikethrough the selected text.
A	Fore Color	Change the font color of the selected text.
	Back Color	Change the background color of the selected text.
	Align	Align the selected text to left, right, justify, or center.
	Body Properties	Change the body properties: • **Body Back Color** — Change the background color of the template using the color palette and color names with RGB or hexadecimal values. • **Content Area Back Color** — Change the background color for the content area in the template using the color palette and color names with RGB or hexadecimal values. • **Link Color** — Change the color of the hyperlink using the color palette and color names with RGB or hexadecimal values. • **Content Area Width** — Change the width of the design canvas. The dimensions must be in the range of 400 to 700 pixels. • **Font** — Change the default font style for the text in the template.

Icon	Icon Name	Description
	Rule Library	Select this option to create and add rules. For more information, see Defining and managing rules

Insert menu

The Insert menu provides the Controls toolbar that allows you to insert text, images, links, buttons, components, and others into the template.

The below table describes the different controls available in the toolbar.

Icon	Icon Name	Description
	Add Section	It acts as a placeholder for the other controls.
	Rich Text	It allows to insert text in the template.
	Image	It allows to insert images in the template.
	Table	It allows to insert tables in the template.
	Button	It allows to insert buttons in the template.
	Video	It allows to insert videos in the template.
	Divider	It is a horizontal line for separating controls within the template.
	Spacer	It inserts spaces between the controls.
	Icons	It enables you to add thumbnail icons in the template. Furthermore, you can control the style of the text displayed along the thumbnail icon.
	Make Component	It allows you to reuse a piece of content from your template across multiple templates.

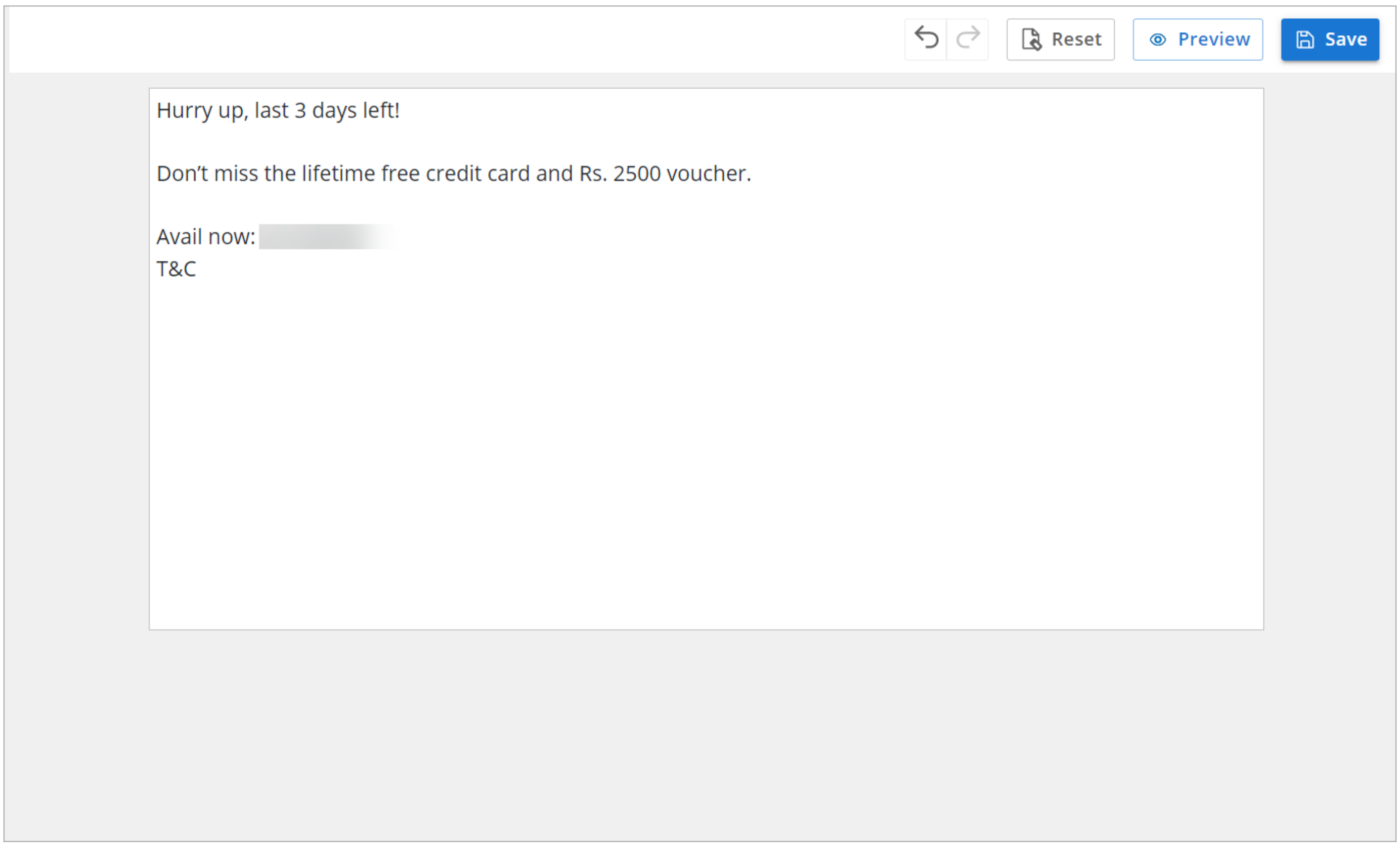
Related topic(s)

- Linking template with a dataset
- Adding controls
- Creating an email template
- Managing templates and jobs
- Creating an on-demand mail/archival job

Adding a message template

Use the message template to design a message (SMS) communication. You can send text messages to share short and precise information. Furthermore, a text message contains only plain text.

For example, banks can send text messages to customers for sharing credit card offers.



To add a message template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon + and then select **Message Template** from the list.

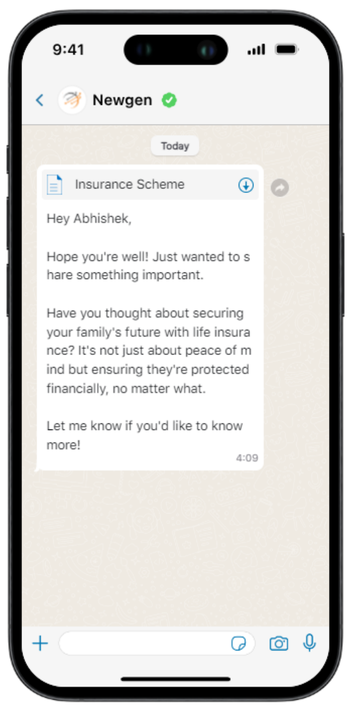
Related topic(s)

- Linking template with a dataset
- Managing templates and jobs
- Creating an on-demand social job

Adding a WhatsApp template

Use the WhatsApp template to design a Whatsapp communication. You can send WhatsApp messages to share business notifications or updates. Furthermore, a WhatsApp message can contain text, an image, or an attachment.

For example, a company can send WhatsApp messages to share promotional discounts to eligible customers.



To add a WhatsApp template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon + and then select **WhatsApp Template** from the list.

The WhatsApp template gets added. In this template, you can do the following:

- Adding an image or attachment
- Adding a text message

Adding an image or attachment

To add an image to the WhatsApp template, follow the below steps:

1. On the design canvas, click **Add Image**.
   The Add Image/File dialog appears.
2. Enter the following details into the corresponding fields:
   - **Field Type**: Select any of the following options:
     - **Image** — Select this option to add an image using a URL.
       - **Image URL** — Enter the URL of the image. The supported image formats are .jpeg and .jpg.

         > - The image URL must be accessible to the application server.
         > - The image URL must end with a "." followed by its file extension.

         In case, a macro field contains a segment of the image URLs, then click **Add Macro**. In the Dataset Field dialog that appears, select the required table name and column from the respective dropdown lists. Then, click **Add** to save. In this way, you can generate images specific to users. By default, the Add Macro button is disabled.

         > - To enable the Add Macro button, you need to configure the dataset fields in the template properties.
         > - You cannot add captions to images. So, in this case, the Caption field is disabled by default.

     - **File** — Select this option to add a document or attachment using a URL. It also provides a download icon that allows users to save the attached document in the WhatsApp message on their devices.
       - **File URL** — Enter the URL of the document or attachment.

         In case, a macro field contains a segment of the file URLs, then click **Add Macro**. In the Dataset Field dialog that appears, select the required table name and column from the respective dropdown lists. Then, click **Add** to save. In this way, you can generate images specific to users. By default, the Add Macro button is disabled.

> To enable the Add Macro button, you need to configure the dataset fields in the template properties.

- **Caption** — Enter the caption of the document or attachment.

  In case, a macro field contains the image captions, then click **Add Macro**. In the Dataset Field dialog that appears, select the required table name and column from the respective dropdown lists. Then, click **Add** to save. In this way, you can generate image captions specific to users. By default, the Add Macro button is disabled.
  To enable the Add Macro button, you need to configure the dataset fields in the template properties.

- **Enable proxy** — Use to enable or disable the proxy server. On enabling this option, the following fields appear:
  - **Server IP** — Enter the proxy server IP address.
  - **Server Port** — Enter the port of the proxy server IP address.

3. Click **Add** to save the changes.

Adding a text message

To add a message to your WhatsApp template, simply type the message in the space provided. You can further select the required text and apply the following text formatting:

- Click **B** to bold the selected text.
- Click *I* to make the selected text italics.
- Click U to underline the selected text.

Related topic(s)

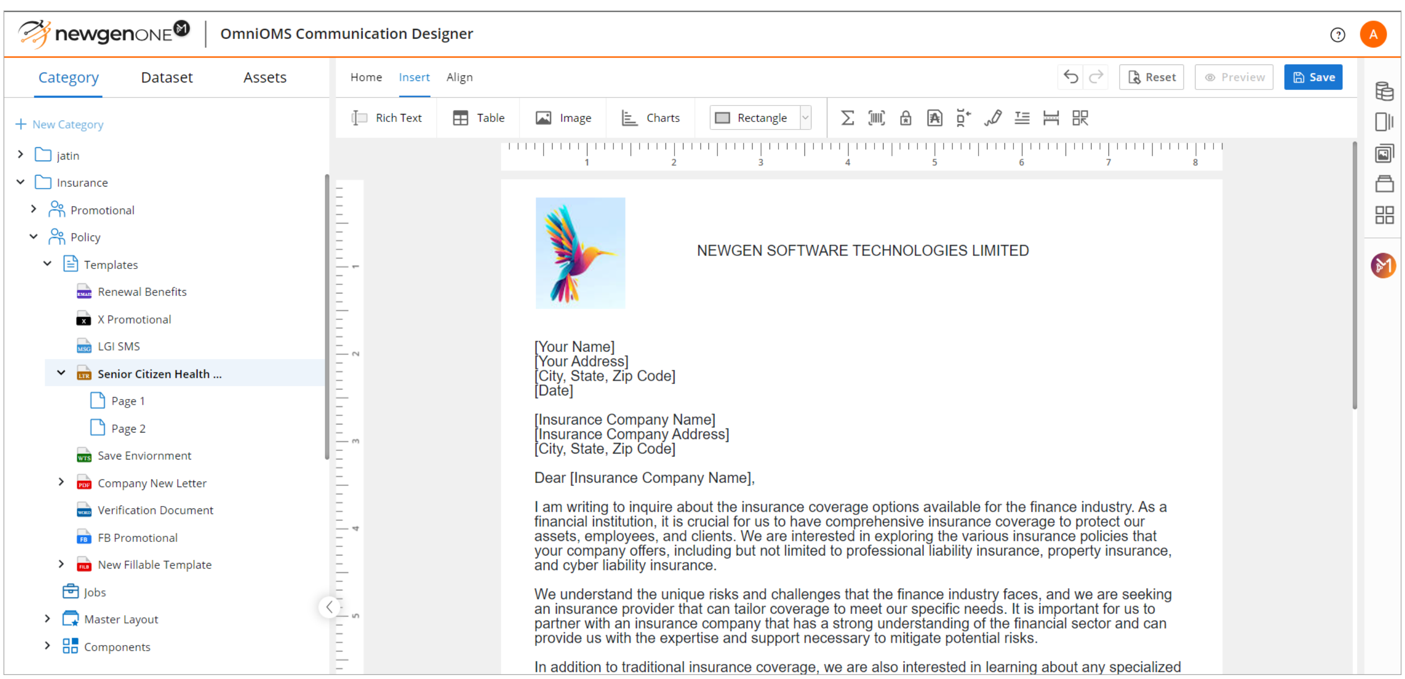
- Linking template with a dataset
- Managing templates and jobs
- Creating an on-demand social job

Adding a letter template

Use the letter template to design a PDF attachment for email communication. The letter template can be added as an attachment for email communications or simply for generation or archival use cases. In a letter template, there can be multiple PDF pages where you can insert text, images, tables, barcodes, digital signatures, and much more. The letter template also provides you the option to secure email attachments using a password. Apart from this, you also use arithmetic expressions in the template for complex calculations.

The letter template is useful for designing welcome letters, or generic letters addressed to a company or individual comprising editable clauses and data fields. The output for the letter template is rendered in PDF format and allows you to perform controlled editing operations before sending it to the concerned stakeholder. The paragraphs, images, and tables are auto-relative in the letter template.

For example, Insurance companies can send policy letters to the new on-boarded customers with the policy details.



To add a letter template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon + and then select **Letter Template** from the list.

You can also add a PDF page in the template by clicking the **Add Page** icon + next to the template name in the Categories pane.

The menu bar of the letter template contains the following menu options:

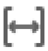
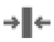
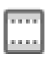
- Home menu
- Insert menu
- Align menu

Home menu

The File menu consists of a formatting toolbar that provides various formatting options to modify the font size, color, alignment, and style.

The below table describes the different formatting options available in the formatting toolbar.

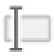
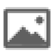
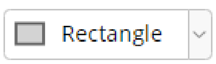
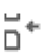
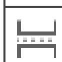
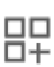
Icon	Icon Name	Description
Arial	Font style	Change the font style of the selected text.
12	Font Size	Change the font size of the selected text.
B	Bold	Bold the selected text.
I	Italics	Make the selected text italics.
U	Underline	Underline the selected text.
~~abc~~	Strikethrough	Strikethrough the selected text.
A	Fore Color	Change the font color of the selected text using the color palette and color names with RGB or hexadecimal values.
	Back Color	Change the background color of the selected text using the color palette and color names with RGB or hexadecimal values.
	Fill Color	Fill tables, rectangles, and circles with colors using the color palette and color names with RGB or hexadecimal values.
	Align	Align the selected text to left, right, justify, or center.
	Align vertically	Align the selected text at the top, middle, or bottom of the table cell.

Icon	Icon Name	Description
	Superscript/ Subscript	Align the selected text above or below the normal line.
	Design background grid	Click to display gridlines on the design canvas.
	Fit to canvas width	Reset the control dimensions to fit the design canvas width. This option is only applicable to tables, rectangles, text, and images.
	Auto Relativity	Use this option to maintain spacing between the controls in the template. • The auto relativity feature does not impact the controls if you resize a table control. • The auto relativity does not have any impact on the line control.
	Header and footer	Allow you to insert header and footer sections into the template. You can add text and images to the header and footer sections. You can also increase or reduce the size of these sections as per your requirements. The header and footer sections are applicable to all the pages in the letter template.
	Increase/ Decrease page	Increases or decreases the size of the page. • On increasing the page size, the design page gets increased by one page. You can only increase the page size by a maximum of four pages. • On decreasing the page size, the design page gets reduced by one page.
	More options	Select any of the following options: • **Rule Library** — Select this option to create and add rules. For more information, see Defining and managing rules. • **Number Sequence Library** — Select this option to create and add sequence lists. For more information, see Creating a multilevel numbering.

Insert menu

The Insert menu provides a Controls toolbar that allows you to insert text, images, links, buttons, and others into the template.

The below table describes the different controls available in the toolbar.

Icon	Icon Name	Description
	Rich Text	It allows to insert text in the template.
	Table	It allows to insert tables in the template.
	Image	It allows to insert images in the template.
	Shape	It allows to insert shapes in the template such as rectangles, lines, and circles.
	Arithmetic Expression	It enables you to add arithmetic expressions in the template.
	Barcode	It allows to add 1-D and 2-D barcodes to the template.
	Password	It allows to protect the document using passwords. You can also control the user rights on the template.
	Watermark configuration	It allows to add watermark in the template.
	Digital signature	It allows to insert digital signatures in the template.
	Annexure configuration	It allows to add annexures to the template. You can also define rules for the annexures.
	Add paragraph	It adds paragraph to the template. This paragraph can be made editable, removable, and skip-numbering by configuring its properties.
	Add page break	It inserts page breaks to the template.
	Component	It allows you to mark a section from your template to create a reusable component. You can use this component across multiple templates.

Align Menu

The Align menu provides various options to align controls, set paragraph spacing, and reset the control size within a template.

These alignment options are only applicable to rich text, images, rectangles, lines, and paragraphs.

Option	Description
Align Vertical Start	Aligns the controls vertically to the top edge of the last selected control.
Align Vertical Center	Aligns the controls vertically to the center of the last selected control.
Align Vertical End	Aligns the controls vertically to the bottom edge of the last selected control.
Align Horizontal Start	Aligns the controls horizontally to the left edge of the last selected control.
Align Horizontal Center	Aligns the controls horizontally to the center of the last selected control.
Align Horizontal End	Aligns the controls horizontally to the right edge of the last selected control.
Equal Height	Resets the height of the controls as that of the last selected control.
Equal Width	Resets the width of the controls as that of the last selected control.
Same Size	Resets the size of the controls as that of the last selected control.
Para spacing	Sets the spacing between the Paragraph controls (in pixels). The spacing value ranges from 4 to 50 pixels.
Merge	Merges the text within the selected Rich Text controls. Ensure the selected Rich Text controls are either aligned vertically or horizontally on the same line. By default, the text is appended in the same line. However, in case, the left edges of the rich text controls are in the same line, then you get an option to merge the text as a paragraph. This means the text of merged controls starts from a new paragraph.

Related topic(s)

- Linking template with a dataset
- Adding controls

- Managing templates and jobs
- Defining and managing rules
- Creating a multilevel numbering
- Creating an on-demand mail/archival job

Adding a design on PDF template

OmniOMS Communication Designer allows you to use an existing PDF as a template. You can import a PDF file and add text, images, and other PDF controls on top of the underlying PDF. Furthermore, you can apply a password to the PDF for encryption purposes. This is useful for designing forms to render as PDF.

For example, a bank loan application gets automated by mapping the applicant details on top of a loan application PDF form.

To add a Design on PDF template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon + and then select **Design on PDF** from the list.

An Open dialog appears. Select the required PDF from your local system and then click **Open**. It takes a few seconds to load the PDF in the communication designer based on the file size. Once the PDF gets successfully loaded, it appears under the Categories pane. You can see the PDF is divided based on its pages.

For example, if the uploaded PDF contains 2 pages, then two-page items appear – Page 1 and Page 2 representing the different pages in the PDF. You can also update the version of PDF file by clicking the **More Options** ••• next to the template and then selecting the **Update PDF** option from the list.

> The new version of the PDF file must have the same number of pages and dimensions as the old version.

The menu bar of the Design on PDF template contains the following menu options:

- Home menu
- Insert menu
- Align menu

Home menu

The File menu consists of a formatting toolbar that provides various formatting options to modify the font size and color, alignment, and formatting style.

The below table describes the different formatting options available in the formatting toolbar.

Icon	Icon Name	Description
Arial	Font style	Change the font style of the selected text.
12	Font size	Change the font size of the selected text.
B	Bold	Bold the selected text.
I	Italics	Make the selected text italics.
U	Underline	Underline the selected text.
abc	Strikethrough	Strikethrough the selected text.
A	Fore color	Change the font color of the selected text.
	Back color	Change the background color of the selected text.
	Align	Align the selected text to left, right, justify, or center.
x^2	Superscript/Subscript	Align the selected text above or below the normal line.
	Rule library	Define rules to apply on the template controls.

Insert menu

The Insert menu provides a Controls toolbar that allows you to insert text, and images, and also provides an option to apply password protection on the PDF.

Icon	Icon Name	Description
	Rich Text	It allows to insert text in the template.
	Image	It allows to insert images in the template.
	Password	It allows to protect the document using passwords. You can also control the user rights on the template.

Align menu

The Align menu provides various options to align controls, set paragraph spacing, and reset the control size within a template.

Option	Description
Align Vertical Start	Aligns the controls vertically to the top edge of the last selected control.
Align Vertical Center	Aligns the controls vertically to the center of the last selected control.
Align Vertical End	Aligns the controls vertically to the bottom edge of the last selected control.
Align Horizontal Start	Aligns the controls horizontally to the left edge of the last selected control.
Align Horizontal Center	Aligns the controls horizontally to the center of the last selected control.
Align Horizontal End	Aligns the controls horizontally to the right edge of the last selected control.
Equal Height	Resets the height of the controls as that of the last selected control.
Equal Width	Resets the width of the controls as that of the last selected control.
Same Size	Resets the size of the controls as that of the last selected control.
Merge	Merges the text within the selected Rich Text controls. Ensure the selected Rich Text controls are either aligned vertically or horizontally on the same line. By default, the text is appended in the same line. However, in case, the left edges of the rich text controls are in the same line, then you get an option to merge the text as a paragraph. This means the text of merged controls starts from a new paragraph.

Related topic(s)

- Linking template with a dataset
- Adding controls
- Working with jobs

Adding a Word template

OmniOMS Communication Designer allows you to use an existing Word document as a template. The uploaded Word document can contain text, dynamic elements, designs, shapes, and other additional content. This template is useful for designing letters, contracts, and agreements that already exist in Word format. Also, once a Word document gets uploaded successfully, it becomes a native template. You can add this template as an email attachment in PDF or DOC/DOCX format. For more information, see Defining an output format.

For example, policy schedules of an insurance policy can be personalized with customer data by simply placing the macros in the Word file.

To preview the Word template, you need to start the Office server. The related configuration details for the Office server must be added in the *OMSAdminConfig.ini* configuration file. For more information, see **NewgenONE OmniOMS Administration Guide**.

To add a Word template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon and then select **Word Template** from the list.

An Open dialog appears. Select the required Word document from your local system and then click **Open**. It takes a few seconds to load the Word document in the communication designer based on the file size. Once the Word document gets successfully loaded, it appears under the Categories pane.

The supported formats for Word documents are DOC and DOCX.

After uploading, you get three buttons that allow you to upload, preview, and download the Word document.

- Click the **Upload** button to replace the existing Word document.
- Click the **Preview** button to view the uploaded content of the Word document. An open dialog appears where you can select the required XML or JSON dataset to view the data.
- Click the **Download** button to save the uploaded document on your local system.

Related topic(s)

- Linking template with a dataset
- Managing templates and jobs
- Defining an output format
- Creating an on-demand mail/archival job

Adding a fillable PDF template

The fillable PDF template allows you to create interactive PDF forms that can be sent to end users for various business use cases, such as application forms, changes in nominations, and updates to policy details. This feature enables bi-directional communication, allowing businesses to collect data seamlessly from their customers.

To add an email template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon + and then select **Fillable Template** from the list.

The menu bar of the fillable template contains the following options:

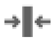
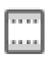
- Home
- Insert menu
- Align

Home

The File menu consists of a formatting toolbar that provides various formatting options to modify the font size, color, alignment, and style.

The below table describes the different formatting options available in the formatting toolbar.

Icon	Icon Name	Description
Arial	Font style	Change the font style of the selected text.
12	Font Size	Change the font size of the selected text.
B	Bold	Bold the selected text.
I	Italics	Make the selected text italics.
U	Underline	Underline the selected text.
~~abc~~	Strikethrough	Strikethrough the selected text.
A	Fore Color	Change the font color of the selected text using the color palette and color names with RGB or hexadecimal values.
	Back Color	Change the background color of the selected text using the color palette and color names with RGB or hexadecimal values.
	Fill Color	Fill tables, rectangles, and circles with colors using the color palette and color names with RGB or hexadecimal values.
	Align	Align the selected text to left, right, justify, or center.
	Align vertically	Align the selected text at the top, middle, or bottom of the table cell.
x^2	Superscript/ Subscript	Align the selected text above or below the normal line.
	Design background grid	Click to display gridlines on the design canvas.
	Fit to canvas width	Reset the control dimensions to fit the design canvas width. This option applies only to tables, rectangles, text, and images.

Icon	Icon Name	Description
	Auto Relativity	Use this option to maintain spacing between the controls in the template. • The auto relativity feature does not impact the controls if you resize a table control. • The auto relativity does not have any impact on the line control.
	Header and footer	Allows you to insert header and footer sections into the template. You can add text and images to the header and footer sections. You can also increase or reduce the size of these sections based on your requirements. The header and footer sections apply to all the pages in the template.
	Increase/ Decrease page	Increases or decreases the size of the page. • On increasing the page size, the design page gets increased by one page. You can only increase the page size by a maximum of four pages. • On decreasing the page size, the design page gets reduced by one page.
	Rule Library	Select this option to create and add rules. For more information, see Defining and managing rules

Insert menu

The Insert menu provides a Controls toolbar that allows you to insert text, images, links, buttons, and others into the template.

The below table describes the different controls available in the toolbar.

Icon	Icon Name	Description
	Rich Text	It allows to insert text in the template.
	Table	It allows to insert tables in the template.
	Image	It allows to insert images in the template.
Rectangle	Shape	It allows to insert shapes in the template such as rectangles, lines, and circles.
	Arithmetic Expression	It enables you to add arithmetic expressions in the template.
	Barcode	It allows to add 1-D and 2-D barcodes to the template.
	Password	It allows to protect the document using passwords. You can also control the user rights on the template.
	Watermark configuration	It allows to add watermark in the template.
	Annexure configuration	It allows to add annexures to the template. You can also define rules for the annexures.
Textbox	Fillable form fields	It allows to insert form fields such as Textbox, Checkbox, Date Picker, List Box, and Radio Button into the template.

Align menu

The Align menu provides various options to align controls, set paragraph spacing, and reset the control size within a template.

These alignment options apply only to rich text, images, rectangles, lines, and paragraphs.

Option	Description
Align Vertical Start	Aligns the controls vertically to the top edge of the last selected control.

Option	Description
Align Vertical Center	Aligns the controls vertically to the center of the last selected control.
Align Vertical End	Aligns the controls vertically to the bottom edge of the last selected control.
Align Horizontal Start	Aligns the controls horizontally to the left edge of the last selected control.
Align Horizontal Center	Aligns the controls horizontally to the center of the last selected control.
Align Horizontal End	Aligns the controls horizontally to the right edge of the last selected control.
Equal Height	Resets the height of the controls as that of the last selected control.
Equal Width	Resets the width of the controls as that of the last selected control.
Same Size	Resets the size of the controls as that of the last selected control.
Merge	Merges the text within the selected Rich Text controls. Ensure the selected Rich Text controls are either aligned vertically or horizontally on the same line. By default, the text is appended in the same line. However, in case, the left edges of the rich text controls are in the same line, then you get an option to merge the text as a paragraph. This means the text of merged controls starts from a new paragraph.

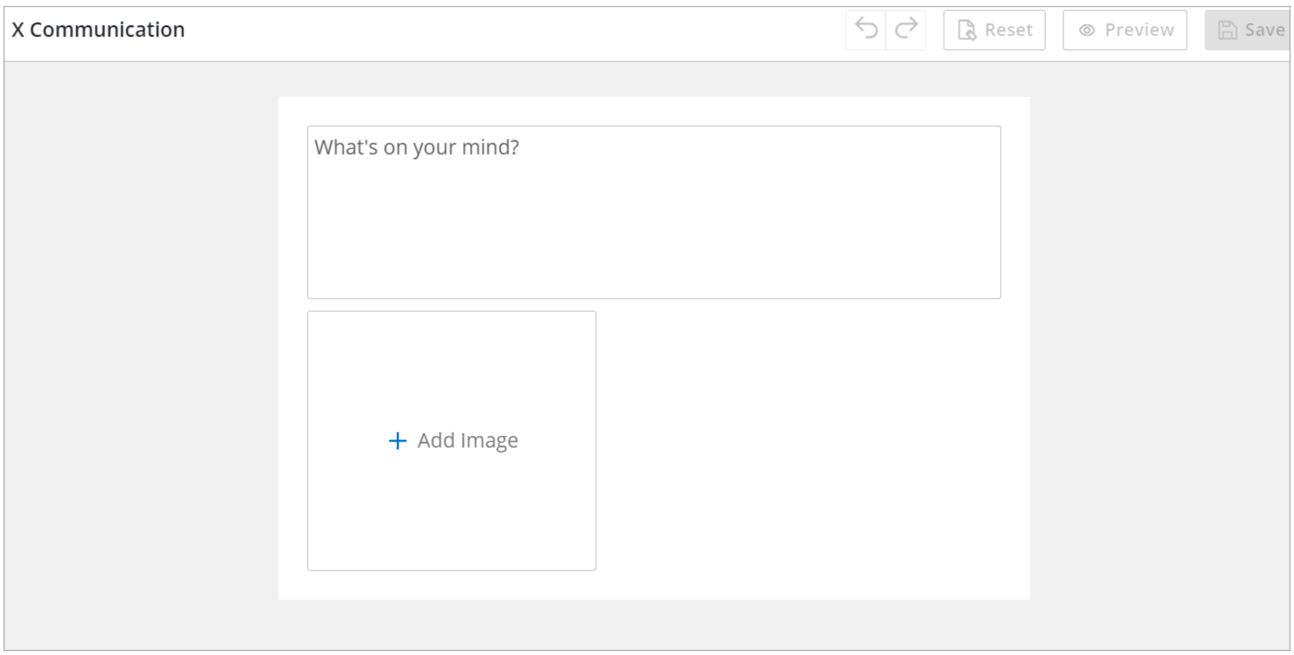
Related topic(s)

- Linking template with a dataset
- Adding controls
- Managing templates and jobs
- Defining and managing rules
- Creating an on-demand mail/archival job

Adding an X template

Use the X template to design X communications. You can send X messages to share business updates, notifications, or engaging content with your audience. An X message can include both text and images to enhance your communication strategy.

For example, a company can use X messages to share real-time updates, event promotions, or visual content with followers.



To add an X template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon and then select **X Template** from the list.

The X template gets added. In this template, you can do the following:

- Adding a text message
- Adding an image

Adding a text message

When you add an X template, a blank space appears prompting you to write your message with the placeholder "What's on your mind?" Simply type your message in the space provided.

Adding an image

To add an image to the X template, follow the below steps:

1. On the design canvas, click **+Add Image**. The Add Image dialog appears.
2. Enter the following details into the corresponding fields:
    - **Image URL** — Enter the image URL. The supported image formats are .jpeg and .jpg.

        - The image URL must be accessible to the application server.
        - The image URL must end with a "." followed by its file extension. For example https://example.com/image.jpg.

        In case, a macro field contains a segment of the image URLs, then click **Add Macro**. In the Dataset Field dialog that appears, select the required table name and column from the respective dropdown lists. Then, click **Add** to save. In this way, you can generate images specific to users. By default, the Add Macro button is disabled.

        - To enable the Add Macro button, configure the dataset fields in the template properties.
        - You cannot add captions to images, so the Caption field is disabled by default.
    - **Enable proxy** — Use to enable or disable the proxy server. On enabling this option, the following fields appear:
        - **Server IP** — Enter the proxy server IP address.
        - **Server Port** — Enter the port of the proxy server IP address.
3. Click **Add** to save the changes.

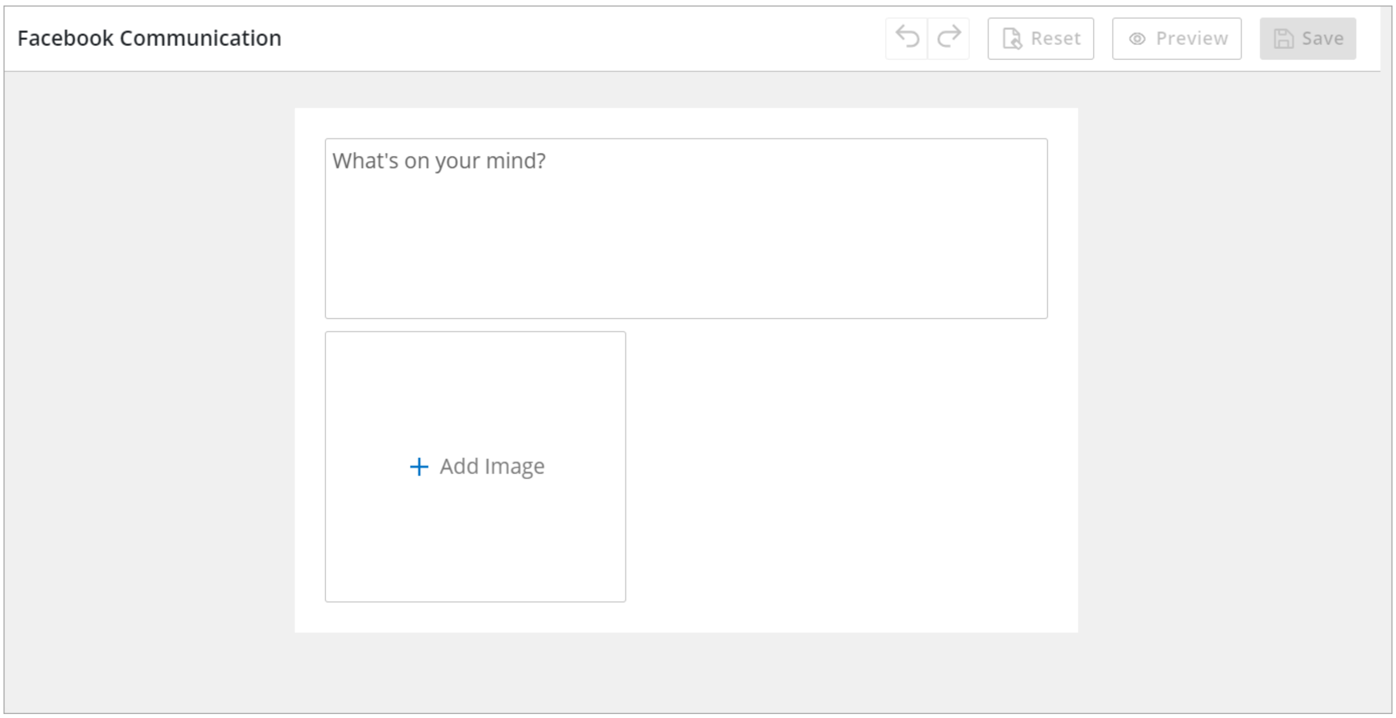
Related topic(s)

- Linking template with a dataset
- Managing templates and jobs
- Creating an on-demand mail/archival job

Adding a Facebook template

Use the Facebook template to design Facebook communications. You can send Facebook messages to engage with your audience, share updates, and promote your brand. A Facebook message can consist of text and images to create compelling posts.

For example, a business can utilize Facebook messages to announce new products, share customer testimonials, or post visually appealing content.



To add a Facebook template, select **Templates** under the required communication group from the Categories pane. Click the **New Template** icon and then select **Facebook Template** from the list.

The Facebook template gets added. In this template, you can do the following:

- Adding a text message
- Adding an image

Adding a Text Message

When you add a Facebook template, a blank space appears prompting you to write your message with the placeholder "What's on your mind?" Simply type your message in the space provided.

Adding an Image

To add an image to the Facebook template, follow the below steps:

1. On the design canvas, click **+Add Image**. The Add Image dialog appears.
2. Enter the following details into the corresponding fields:
   - **Image URL** — Enter the URL of the image. The supported image formats are .jpeg and .jpg.
     - The image URL must be accessible to the application server.
     - The image URL must end with a "." followed by its file extension.

     In case, a macro field contains a segment of the image URLs, then click **Add Macro**. In the Dataset Field dialog that appears, select the required table name and column from the respective dropdown lists. Then, click **Add** to save. In this way, you can generate images specific to users. By default, the Add Macro button is disabled.

     - To enable the Add Macro button, you need to configure the dataset fields in the template properties.
     - You cannot add captions to images. So, in this case, the Caption field is disabled by default.
   - **Enable proxy** — Use to enable or disable the proxy server. On enabling this option, the following fields appear:
     - **Server IP** — Enter the proxy server IP address.
     - **Server Port** — Enter the port of the proxy server IP address.
3. Click **Add** to save the changes.

Related topic(s)

- Linking template with a dataset
- Managing templates and jobs
- Creating an on-demand mail/archival job

Linking template with a dataset

To add data to your communication template, you need to link it with a dataset.

This is applicable only in the case of a mixed dataset communication group. This is because all the templates within this communication group are linked to different datasets.

To link the template with a dataset, follow the below steps:

1. From the Categories pane, select the required communication group.
2. On the right, select the Datasets Gallery. It lists all the datasets added in the selected cabinet.
3. Select the required dataset from the list.
4. Click **Link with Template**.
   The template gets now linked with the dataset.

Adding controls

OmniOMS Communication Designer provides you with a wide range of controls for creating templates. The controls can be rich text, image, button, video, table, spacer, divider, barcode, shape, and many more.

Email template

The email template supports the following controls. You can simply drag and drop the control from the Controls toolbar to the section.

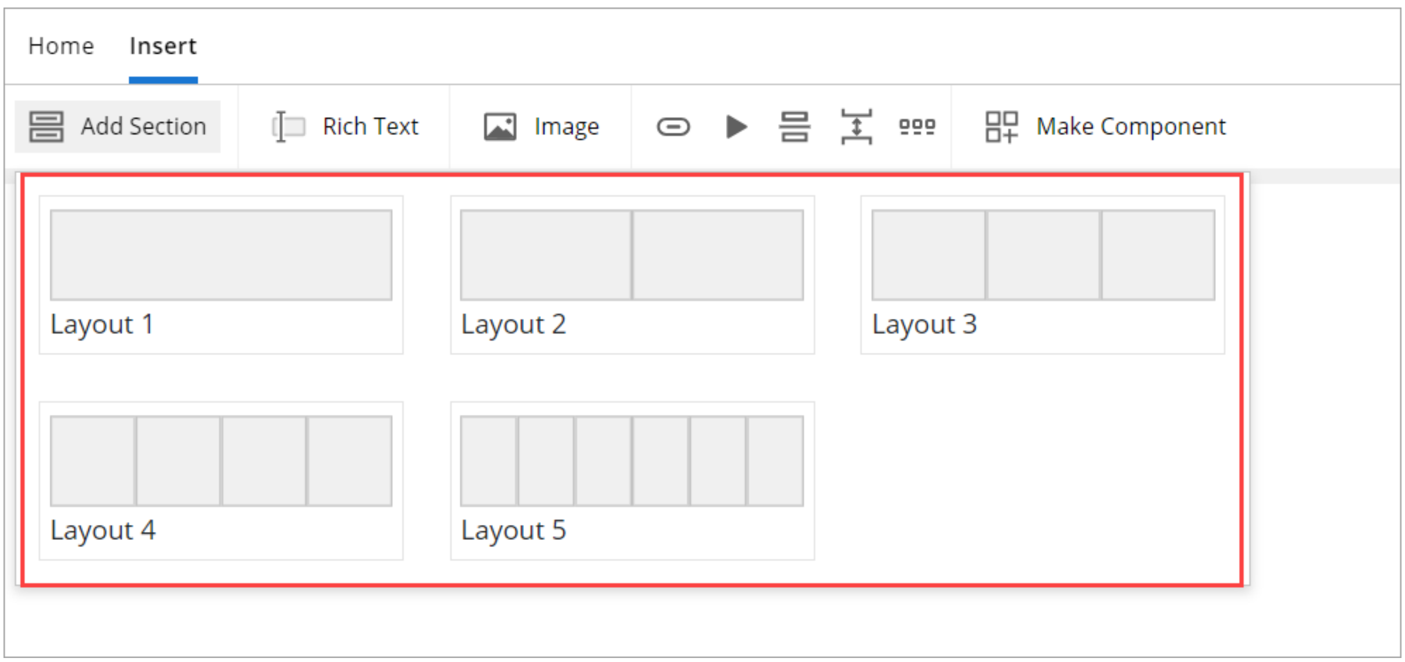
- Section
- Rich text
- Image
- Table
- Button
- Video
- Divider
- Spacer
- Icon
- List
- Component

When you add controls to the template, you can configure its properties and perform various operations on it. The properties of each control vary.

Section

Sections work as basic building blocks for designing an email template. Each section acts as a placeholder to insert one or more controls. Within a section, there are multiple subsections for placing multiple controls. OmniOMS Communication Designer uses sections to make emails responsive across varied devices. The subsections within the section get stacked over each other if the defined width of the content area or device screen size is less than 700 pixels.

When you add an email template, a section is already added to the design area by default. In Communication Designer, you can add sections of different layouts.



In order to add a section, go to the **Insert** tab. Click the **Section** control from the Controls toolbar and select the required layout, and then drag and drop it to the design area. This topic provides details about the properties and various operations you can apply to a Section control:

- Configuring section properties
- Moving a section
- Adding another section
- Copying a section
- Deleting a section

Configuring section properties

Select the **Section** control to configure the section properties and then click **Edit** from the pop-up toolbar. The Edit Section dialog appears.

The upper left portion of the dialog displays the layout of the control. Use the add icon to insert a new section into the component and click the cross icon to remove a section. You can also adjust the size of the subsection using the resize arrow. The bottom left portion of the dialog shows the preview of the section based on the settings defined in the Settings tab.

> You can add a maximum of six subsections.

The different tabs in the Edit Section dialog are Structure and Section. In the Structure tab, you can set the appearance of the section. For example, you can specify the background color, border color, border type, border width, and others for the section. However, in the Sub-Section tab, you can set the appearance of the subsection in a section. For example, you can set the padding and border settings for the subsections in the Sub-Section tab. To set the settings for a specific subsection, select the required section from the upper left portion of the dialog.

The following table describes the different properties available in the Structure tab of the Edit Section dialog:

Property	Description
Section Area	
Background Color	Specify the background color of the section using the color palette or enter the color names. For example, red.
Content Area	
Background Color	Specify the background color of the content area in the section using the color palette or enter the color names. For example, red.

Property	Description
Border Setting	Specify the border setting for the section using any of the following options: • **All Sides** — Select this option to apply the border on all sides. Specify the color in the **All Border Color** field using the color palette or enter the color names in the space provided. Also, specify the width (in pixels) and type of the border. The supported border types are solid, dotted, or dashed. • **Individual Sides** — Select this option to apply different borders on the sides. Specify the color for the left, right, top, and bottom borders using the color palette, or enter the color names in the space provided. Also, specify the width (in pixels) and type of the border. The supported border types are solid, dotted, or dashed. You can set the size of the border from 0 to 30 pixels.
All Border Radius/ Border Radius	Specify the section corner radius (in pixels) using any of the following options: • **All sides** — Select this option to specify the corner radius for all borders. Enter the padding value in the **All Radius** field. • **Individual sides** — Select this option to specify the corner radius for different borders. Enter the corner radius for the left, right, top, and bottom borders. The padding value can be set in the range from 0 to 30 pixels.

The following table describes the different properties available in the Sub-Section tab of the Edit Section dialog.

Property	Description
Background Color	Specify the background color of the sub-section in the section using the color palette or enter the color names. For example, red.

Property	Description
Border Setting	Specify the border setting for the sub-section using any of the following options: • **All Sides** — Select this option to apply the border on all sides. Specify the color in the **All Border Color** field using the color palette or enter the color names in the space provided. Also, specify the width (in pixels) and type of the border. The supported border types are solid, dotted, or dashed. • **Individual Sides** — Select this option to apply different borders on the sides. Specify the color for the left, right, top, and bottom borders using the color palette, or enter the color names in the space provided. Also, specify the width (in pixels) and type of the border. The supported border types are solid, dotted, or dashed. You can set the size of the border from 0 to 30 pixels.
Padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the section borders. Enter the padding value in the **All Padding** field. • **Individual sides** — Select this option to apply different padding on the section borders. Enter the padding for the left, right, top, and bottom borders. The padding value can be set in the range from 0 to 30 pixels.

Moving a section

To move the control from one position to another within the template, follow the below steps:

1. On the design canvas, select the required control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Adding another section

To add a new section below the selected section, follow the below steps:

1. Select the Section control. A pop-up toolbar appears.
2. Click the **Add Below** icon . A pop-up dialog appears.
3. Select the required layout for the section.
   A new section with the selected layout gets added below the section.

Copying a section

To copy a section, follow the below steps:

1. On the design canvas, select the required control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The control gets copied.

Deleting a section

To remove a control from the template, select the required control on the design canvas and then click the **Delete** icon from the pop-up toolbar.

Image

Use the Image control to embed an image into the Email template.

To add an image, go to the **Insert** tab. Drag the Image control from the Controls toolbar and then place it on the section. The supported image formats are .jpg, .jpeg, gif, and SVG. This topic provides details about the different image properties and various operations you can apply to an Image control:

- Configuring image properties
- Moving an image
- Copying an image
- Deleting an image

Configuring image properties

There are two ways to set the image properties:

- Select the Image control and then click **Edit** from the pop-up toolbar. The Image Properties dialog appears.
- Double-click the Image control to open the Image Properties dialog.

The following table describes the properties of the Image Properties dialog:

Property	Description
Image Source URL	Enter the URL indicating the location of the image. The supported image formats are .png, .jpg, .jpeg, gif, and SVG. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension.
Preview	It displays the preview of the image.
Image Width	Specify the width of the image in percentage. You can adjust the image width using the slider or by directly entering the value in the space provided. The image width can vary from 20 to 100 percent. By default, the image width is set to 100 percent.
Alignment	Specify the alignment of the image. It can be set to left, right, or center.

Property	Description
Alt Text	Specify the alternative text of the image. This text appears when the image fails to load.
Target URL	Specify the target URL for the image, which is an anchor link to another web page. On clicking the image during the preview, you get directed to the required link.
Block Padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the control's borders. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the control's borders. Enter the padding for the left, right, top, and bottom sides. You can set padding ranging from 0 to 30 pixels.

Click **OK** to save the changes.

Moving an image

To move an image from one position to another within the template, follow the below steps:

1. Select the Image control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying an image

To copy an image, follow the below steps:

1. Select the Image control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The image gets copied.

Deleting an image

To remove an image from the template, select the required Image control on the template and then click the **Delete** icon from the pop-up toolbar.

Rich text

Use the Rich Text control to display formatted text in an email template. You can apply text formatting to highlight or emphasize the text in an email by changing the text font and size, specifying the font color, applying letter and paragraph spacing, setting block padding, and others.

To add text, go to the **Insert** tab. Drag the Rich Text control from the Controls toolbar and then place it on the section. This topic provides details about the properties and various operations you can apply to a Rich Text control:

- Configuring text properties
- Moving a text
- Copying a text
- Adding a macro field
- Inserting a hyperlink
- Deleting a text

Configuring text properties

There are two ways to set the rich text properties:

- Select the Rich Text control and then click **Edit** from the pop-up toolbar. The Text Properties dialog appears.
- Double-click the Rich Text control to open the Text Properties dialog.

The following table describes the properties of the Text Properties dialog:

Property	Description
Font family	Specify the text font. By default, it is set to basefont.
Font size	Specify the text size in pixels. The default value is 12 pixels.
Bold	Click to make the text bold.
Font color	Specify the text color using the color palette or enter the color names with hexadecimal values. For example, #ffffff.
Letter spacing	Specify the spacing between the characters within a text. By default, it is set to 0 pixels.

Property	Description
Paragraph spacing	Specify the spacing between the paragraphs within the rich text control. By default, it is set to 16 pixels.
Line height	Specify the spacing between the lines within the rich text control. This value is represented in the percentage of the letter height. By default, it is set to 120%.
Alignment	Specify the alignment of the text. It can be set to left, right, or center.
Block padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the control's borders. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the control's borders. Enter the padding for the left, right, top, and bottom sides. You can set padding ranging from 0 to 30 pixels.

Click **OK** to save the changes.

Moving a text

To move a rich text control from one position to another within the template, follow the below steps:

1. Select the Rich Text control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying a text

To copy a rich text control, follow the below steps:

1. Select the Rich Text control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The control gets copied.

Adding a macro field

A macro field is a field in the linked dataset. You can add macro fields in the rich text control to show dynamic content. For example, you can insert macro fields to display an employee's name, address, phone, designation, and other details in the email.

To add a macro field, follow the below steps:

1. Right-click the Rich Text control.
2. Select **Add Macro** option from the list. The Dataset Field dialog appears.
3. Select the table name from the dropdown list.
4. Select the column name from the dropdown list.
5. Click **OK**.

Adding a hyperlink

Insert hyperlinks to link the text with a web page.

To add a hyperlink, follow the below steps:

1. Right-click text in the Rich Text control.
2. Select **Add Hyperlink** option from the list.
   The Add Hyperlink dialog appears.
3. Enter the name of the hyperlink. By default, the selected text appears in this field.
4. Then, specify the target link.
5. Click **Save** to confirm.

Deleting a text

To remove a rich text control from the template, select the required Rich Text control on the template and then click the **Delete** icon from the pop-up toolbar.

Table

Use the table control in your email template to display data in tabular format. A table is composed of rows and columns. You can add, remove, or resize rows and columns. Additionally, you can display dynamic content, merge cells, and add headers.

To add a table, go to the **Insert** tab. Drag the **Table** control from the Controls toolbar and then place it on the desired section. The Table Template dialog appears. Select the number of rows and columns by hovering over the grid until the desired number of boxes are highlighted. Click to create the table. The table appears in the selected section. This topic covers the following sections:

- Configuring table properties
- Moving a table
- Copying a table
- Adding a macro field
- Adding a hyperlink
- Deleting a table
- Configuring table style
- Configuring cell style
- Inserting a row or column
- Deleting a row or column
- Merging table cells

Configuring table properties

To configure the table properties, perform the following steps:

1. Select the Table and then click Edit from the pop-up toolbar. The Table Properties dialog appears with the following options:

Option	Description
Row	
Pin Header Row	This toggle button allows you to set a header for the table. It fix the first row of your table as a header.
Header Color	Allows you to choose a color for the header from the color palette.
Set Row Alternate Color	This toggle button allows you to enable alternating row colors.
Odd Row Color	Allows you to choose the color for the odd-numbered rows from the color palette.
Even Row Color	Allows you to choose the color for the even-numbered rows from the color palette.
Column	

Option	Description
Equalise Width	This toggle button allows you to make all columns equal in width.
Set Column Alternate Color	This toggle button allows you to enable alternating column colors.
Odd Column Color	Allows you to choose the color for the odd-numbered columns from the color palette.
Even Column Colour	Allows you to choose the color for the odd-numbered columns from the color palette.

2. Click **Save**.

Moving a table

To move a table from one position to another within the template, follow the below steps:

1. Select the table. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying a table

To copy a table, follow the below steps:

1. Select the table. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The table gets copied.

Adding a macro field

A macro field is a field in the linked dataset. You can add macro fields in the table to show dynamic content. For example, you can insert macro fields to display an employee’s name, address, phone, designation, and other details in the email.

To add a macro field, follow the below steps:

1. Right-click the table cell.
2. Select **Add Macro** option from the list. The Dataset Field dialog appears.
3. Select the table name from the dropdown list.
4. Select the column name from the dropdown list.
5. Click **OK**.

Adding a hyperlink

Insert hyperlinks to link the table with a web page.

To add a hyperlink, follow the below steps:

1. Right-click text in the table.
2. Select **Add Hyperlink** option from the list.
   The Add Hyperlink dialog appears.
3. Enter the name of the hyperlink. By default, the selected text appears in this field.
4. Then, specify the target link.
5. Click **Save** to confirm.

Deleting a table

To remove a table from the template, select the required table on the template and then click the **Delete** icon from the pop-up toolbar.

Configuring table style

To configure the table style, perform the following steps:

1. On the design canvas, select the required table.
2. Go to the **Table** tab and then select **Table Style**.
   The Table Style dialog appears with the following options:

Property	Description
Background Color	Specify the background color using the color palette or enter the color name using a hexadecimal value.
Border Settings	Allows you to select the border settings based on the following options: • **All Sides** — Select this option to apply the border settings on all the table sides. • **Individual Sides** — Select this option to apply the different border settings on the sides.
All Border Color	Specify the table border color using the color palette or enter the color name using a hexadecimal value.
All Border Size	Set the border size in pixels.

Property	Description
All Border Type	Set the border type with the following available options: • solid • dotted • dashed
Block Padding	Allows you to apply the block padding based on the following options: • **All Sides** — Select this option to apply the block padding on all the table sides. • **Individual Sides** — Select this option to apply the different block padding on the sides.
All Block Padding	Specify the block padding for all sides in pixels.

3. Click **Save**.

Configuring cell style

To configure the cell style, perform the following steps:

1. On the design canvas, select the required table.
2. Go to the **Table** tab and then select **Cell Style**.
   The Cell Style dialog appears with the following options:

Property	Description
Background Color	Specify the background color using the color palette or enter the color name using a hexadecimal value.
Letter Spacing	Specify the letter spacing in pixels.
Line Height	Specify the line height as a percentage.
Align	Align the cell content to top left, top center, top right, center left, center, center right, bottom left, bottom center, and bottom right.
Border Settings	Allows you to select the border settings based on the following options: • **All Sides** — Select this option to apply the border settings on all the table sides. • **Individual Sides** — Select this option to apply the different border settings on the sides.
All Border Color	Specify the table border color using the color palette or enter the color name using a hexadecimal value.

Property	Description
All Border Size	Set the border size in pixels.
All Border Type	Set the border type with the following available options: • solid • dotted • dashed
Cell Padding	Allows you to apply the cell padding based on the following options: • **All Sides** — Select this option to apply the cell padding on all the table sides. • **Individual Sides** — Select this option to apply the different cell padding on the sides.
All Padding	Specify the cell padding for all sides in pixels.

3. Click **Save**.

Inserting a row or column

To insert a row or column:

1. On the design canvas, place the cursor on the required table cell.
2. Press the **Shift** key and the left mouse button.
   The table cell gets selected.
3. Go to the **Table** tab, and select **Insert** dropdown. The following options appear to select:
   - **Insert Row Above** — Adds a new row directly above the selected row.
   - **Insert Row Below** — Adds a new row directly below the selected row.
   - **Insert Col to Left** — Adds a new column directly to the left of the selected column.
   - **Insert Col to Right** — Adds a new column directly to the right of the selected column.
     The row or column is added to the position.

Deleting a row or column

To delete a row or column:

1. On the design canvas, place the cursor on the required table cell.
2. Press the **Shift** key and the left mouse button.
   The table cell gets selected.

3. Go to the **Table** tab, and select **Delete** dropdown. The following options appear to select:
    - Delete Row — Removes the entire row where the selected cell is located.
    - Delete Column — Removes the entire column where the selected cell is located.

      The row or column is deleted from the selected position.

Merging table cells

To merge the table cells, follow the below steps:

1. On the design canvas, select the required table cells by pressing the Shift key and left-mouse click.
2. Go to the **Table** tab and then select **Merge Cell**.
   The cells are now merged.
   To unmerge the cells, select the merged cell by pressing the Shift key and left-mouse click. Then, go to the Table tab and select **Unmerge Cell**.

Button

Add buttons to link to another web page in an email. For example, you can use a button in an email to send customers to your company website. With the help of buttons, you can effectively improve the customer interactivity rate. Apart from this, OmniOMS Communication Designer provides you with various options to customize the appearance of the button.

To add a button, go to the **Insert** tab. Drag the Button control from the Controls toolbar and then place it on the section. This topic provides details about the properties and various operations you can apply to a Button control:

- Configuring button properties
- Moving a button
- Copying a button
- Deleting a button

Configuring button properties

There are two ways to set the button properties:

- Select the Button control and then click **Edit** from the pop-up toolbar. The Button Properties dialog appears.
- Double-click the Button control to open the Button Properties dialog.

The following table describes the properties of the Button Properties dialog:

Property	Description
Auto width	Select to automatically resize the width of the button based on the entered text. Otherwise, you can adjust the button width using the slider or by directly entering the value in the provided space. The button width can vary from 20 to 100 percent relative to the width of the sub-section.
Background color	Specify the color of the button using the color palette or enter the color names with hexadecimal values. For example, #ffffff.
Font color	Specify the text color using the color palette or enter the color names with hexadecimal values. For example, #ffffff.
Font	Specify the font style of the text.

Property	Description
Font size	Specify the font size of the text in pixels. By, default the font size is set to 12 pixels.
Font weight	Specify the font weight of the text. It can be set to regular or bold. By default, the font weight is set to regular.
Button alignment	Specify the alignment of the button within the component. It can be set to left, right, or center.
Line height	Specify the spacing between the lines within the rich text control. This value is represented in the percentage of the letter height. By default, it is set to 120%.
Letter spacing	Specify the spacing between the characters in a text. By default, it is set to 2 pixels.
Border color	Specify the border color for the button using the color palette or enter the color names with hexadecimal values. For example, #ffffff..
Border width	Specify the border width for the button. By default, no border is applied to the Button control.
Border type	Specify the border type for the button. It can be set to solid, dotted, and dashed. By default, the border type is set to solid.
Radius	Specify the corner radius for the button.
Text padding	Specify the text padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding within the control content and border. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding within the control content and border. Enter the padding for the left, right, top, and bottom borders. You can set padding ranging from 0 to 30 pixels.

Property	Description
Block padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the control's borders. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the control's borders. Enter the padding for the left, right, top, and bottom sides. You can set padding ranging from 0 to 30 pixels.

Moving a button

To move a button from one position to another within the template, follow the below steps:

1. Select the Button control. A pop-up toolbar appears.
2. Click and hold the **Move** icon  from the toolbar and drop it to the new location.

Copying a button

To copy a button, follow the below steps:

1. Select the Button control. A pop-up toolbar appears.
2. Click the **Copy** icon  from the toolbar.
   The button gets copied.

Deleting a button

To remove a button from the template, select the required Button control on the template and then click the **Delete** icon  from the pop-up toolbar.

Divider

Use Divider to insert a horizontal line for separating content within an email. You can add a divider to distinguish different sections or break lengthy sections in an email message.

To add a divider, go to the **Insert** tab. Drag the Divider control from the Controls toolbar and then place it on the section. This topic provides details about the properties and various operations you can apply to a Divider control:

- Configuring divider properties
- Moving a divider
- Copying a divider
- Deleting a divider

Configuring divider properties

There are two ways to set the divider properties:

- Select the Divider control and then click **Edit** from the pop-up toolbar. The Divider Properties dialog appears.
- Double-click the Divider control to open the Text Properties dialog.

The following table describes the properties of the Divider Properties dialog:

Property	Description
Color	Specify the color of the divider using the color palette or enter the color names with hexadecimal values. For example, #ffffff.
Width	Specify the width of the divider in pixels. By default, the width is set to 100 pixels.
Line height	Specify the height of the divider in pixels. By default, the line height is set to 1 pixel.
Line type	Specify the line type for the divider. It can be set to solid, dotted, and dashed.
Alignment	Specify the alignment of the divider within the component. It can be set to left, center, or right.

Property	Description
Block padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the control's borders. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the control's borders. Enter the padding for the left, right, top, and bottom sides. You can set padding ranging from 0 to 30 pixels.

Moving a divider

To move a divider from one position to another within the template, follow the below steps:

1. Select the Divider control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying a divider

To copy a divider, follow the below steps:

1. Select the Divider control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The divider gets copied.

Deleting a divider

To remove a divider from the template, select the required Divider control on the template and then click the **Delete** icon from the pop-up toolbar.

Spacer

Use Spacer to insert spaces between the controls. To add spacing, go to the **Insert** tab. Drag the Spacer control from the Controls toolbar and then place it on the section.

This topic provides information about the spacer properties and different operations you can apply to a Spacer control:

- Configuring spacer properties
- Moving a spacer
- Copying a spacer
- Deleting a spacer

Configuring spacer properties

There are two ways to set the spacer properties:

- Select the Spacer control and then click **Edit** from the pop-up toolbar. The Spacer Properties dialog appears.
- Double-click the Spacer control to open the Spacer Properties dialog.

Property	Description
Height	Specify the height for the Spacer control.

Moving a spacer

To move a spacer from one position to another within the template, follow the below steps:

1. Select the Spacer control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying a spacer

To copy a spacer, follow the below steps:

1. Select the Spacer control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The spacer gets copied.

Deleting a spacer

To remove a spacer from the template, select the required Spacer control on the template and then click the **Delete** icon from the pop-up toolbar.

Video

OmniOMS Communication Designer allows you to insert videos in your email template to increase the customer interactivity rate. For example, you can add a video to give quick product demos to the customers.

To add a video, go to the **Insert** tab. Drag the Video control from the Controls toolbar and then place it on the section. This topic provides details about the properties and various operations you can apply to a Video control:

- Configuring video properties
- Moving a video control
- Copying a video control
- Deleting a video control

Configuring video properties

There are two ways to set the video properties:

- Select the Video control and then click **Edit** from the pop-up toolbar. The Video Properties dialog appears.
- Double-click the Video control to open the Video Properties dialog.

The following table describes the properties of the Video Properties dialog:

Property	Description
Video title	Specify the title of the video.
Video URL	Specify the URL of the video.
Preview Image URL	Specify the URL of the image poster to use in the video. This poster appears until the user hits the play button. The supported image formats are .png, .jpg, .jpeg, and gif. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension. • Ensure to host the image poster on the client's CDN server. For more information, see **NewgenONE OmniOMS Developer Guide**.

Property	Description
Play Button URL	Specify the URL of the play button image to use in the video. The supported image formats are .png, .jpg, .jpeg, and gif. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension. • Ensure to host the image poster on the client’s CDN server. For more information, see NewgenONE OmniOMS Developer Guide.
Preview	It shows the preview of the video.
Block Padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the control's borders. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the control's borders. Enter the left, right, top, and bottom sides padding. You can set padding ranging from 0 to 30 pixels.

Moving a video control

To move the Video control from one position to another within the template, follow the below steps:

1. Select the Video control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying a video control

To copy the video control, follow the below steps:

1. Select the Video control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The video gets copied.

Deleting a video control

To remove a video from the template, select the required Video control on the template and then click the **Delete** icon from the pop-up toolbar.

Icon

Use icons to display small-dimension images within the email template. For example, you can use icons for Facebook, WhatsApp, Outlook, and others in the template.

To add an icon, go to the **Insert** tab. Drag the Icons control from the Controls toolbar and then place it on the section. This topic provides details about the properties and various operations you can apply to the Icons control:

- Configuring icon properties
- Moving an icon
- Copying an icon
- Deleting an icon

Configuring icon properties

1. Select the Icons control and then click **Edit** from the pop-up toolbar. Alternatively, double-click the Icons control.
   The Icons Properties dialog appears.
2. Select the type of menu type for the icon. It can be any of the following:
   - **Icon —** Select this option to only insert an image.

Property	Description
Icon properties	
Image Source URL	Enter the URL indicating the location of the image. The supported image formats are .png, .jpg, .jpeg, and gif. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension.
Preview	It displays the preview of the image.
Title	Specify the title for the image. It appears when you hover the mouse cursor over the image during template preview.
Alt Text	Specify the alternative text for the image. This text appears when the image fails to load.

Property	Description
Target URL	Specify the target URL for the image, which is an anchor link to another web page. On clicking the image during the preview, you get directed to the required link.
Common properties	
Alignment	Specify the alignment of the image. It can be set to left, right, or center.
Icon Size	Specify the size of the icon. By default, it is set to 16 pixels.
Icon Spacing	Specify the spacing between the two icons in pixels.
Icon Padding	Specify the icon padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the icon's borders. Enter the padding value in the **All Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the icon's borders. Enter the padding for the left, right, top, and bottom sides. You can set padding ranging from 0 to 30 pixels.
Block Padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the control's borders. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the control's borders. Enter the padding for the left, right, top, and bottom sides. You can set padding ranging from 0 to 30 pixels.

Click the **Add New Icon** to insert another icon. Additionally, you can use the up and down arrows to arrange icons within the control.

- **Icon + Text —** Select this option to insert an image with a short text.

Property	Description
Icon + Text properties	
Image Source URL	Enter the URL indicating the location of the image. The supported image formats are .png, .jpg, .jpeg, and gif. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension.
Preview	It displays the preview of the image.
Icon + Text	Specify the text to display with the image.
Title	Specify the title for the image. It appears when you hover the mouse cursor over the image during template preview.
Alt Text	Specify the alternative text of the image. This text appears when the image fails to load.
Target URL	Specify the target URL for the image, which is an anchor link to another web page. On clicking the image during the preview, you get directed to the required link.
Common Properties	
Font	Specify the text font. By default, it is set to basefont.
Font size	Specify the text size in pixels. The default size is 12 pixels.
Font color	Specify the text color using the color palette or enter the color names with hexadecimal values. For example, #ffffff.
Letter spacing	Specify the spacing between the characters within a text. By default, it is set to 0 pixels.
Alignment	Specify the alignment of the image. It can be set to left, right, or center.
Icon Size	Specify the size of the icon. By default, it is set to 16 pixels.
Separator	Specify the separator you want to use for separating the icons. This property is disabled in case of vertical layout.
Icon Spacing	Specify the spacing between the two icons in pixels.

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td>Icon Padding</td><td>Specify the icon padding (in pixels) using any of the following options:
All sides — Select this option to apply the same padding around all the icon's borders.
Enter the padding value in the All Block Padding field. You can also use the up or down arrow to increase or decrease the padding value.
Individual sides — Select this option to apply different padding on the icon's borders.
Enter the padding for the left, right, top, and bottom sides.
You can set padding ranging from 0 to 30 pixels.</td></tr>
<tr><td>Block Padding</td><td>Specify the padding (in pixels) using any of the following options:
All sides — Select this option to apply the same padding around all the control's borders.
Enter the padding value in the All Block Padding field. You can also use the up or down arrow to increase or decrease the padding value.
Individual sides — Select this option to apply different padding on the control's borders.
Enter the padding for the left, right, top, and bottom sides.
You can set padding ranging from 0 to 30 pixels.</td></tr>
</table>

Click the **Add New Icon** to insert another icon. Additionally, you can use the up and down arrows to arrange icons within the control.

- **Text** — Select this option to only insert text.

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td colspan="2">Text Properties</td></tr>
<tr><td>Text</td><td>Specify the text to display with the image.</td></tr>
<tr><td>Title</td><td>Specify the title for the image.
It appears when you hover the mouse cursor over the image during template preview.</td></tr>
<tr><td>Target URL</td><td>Specify the target URL for the image. The target URL provides additional information apart from the image.</td></tr>
<tr><td colspan="2">Common properties</td></tr>
<tr><td>Layout</td><td>Specify whether to arrange the text horizontally or vertically.
This property is available only in the case of multiple texts.</td></tr>
<tr><td>Separator</td><td>Specify the separator you want to use for separating the icons.
This property is disabled in case of vertical layout.</td></tr>
<tr><td>Alignment</td><td>Specify the alignment of the image. It can be set to left, right, or center.</td></tr>
<tr><td>Icon Size</td><td>Specify the size of the icon. By default, it is set to 16 pixels.</td></tr>
<tr><td>Icon Spacing</td><td>Specify the spacing between the two icons in pixels.</td></tr>
<tr><td>Icon Padding</td><td>Specify the icon padding (in pixels) using any of the following options:
All sides — Select this option to apply the same padding around all the icon's borders.
Enter the padding value in the All Block Padding field. You can also use the up or down arrow to increase or decrease the padding value.
Individual sides — Select this option to apply different padding on the icon's borders.
Enter the padding for the left, right, top, and bottom sides.
You can set padding ranging from 0 to 30 pixels.</td></tr>
</table>

Property	Description
Block Padding	Specify the padding (in pixels) using any of the following options: • **All sides** — Select this option to apply the same padding around all the control's borders. Enter the padding value in the **All Block Padding** field. You can also use the up or down arrow to increase or decrease the padding value. • **Individual sides** — Select this option to apply different padding on the control's borders. Enter the padding for the left, right, top, and bottom sides. You can set padding ranging from 0 to 30 pixels.

Click the **Add New Item** to insert another text. Additionally, you can use the up and down arrows to arrange items within the control.

3. Click **Save**.

Moving an icon

To move an icon from one position to another within the template, follow the below steps:

1. Select the Icons control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying an icon

To copy an icon, follow the below steps:

1. Select the Icons control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The icon gets copied.

Deleting an icon

To remove an icon from the template, select the required Icons control on the template and then click the **Delete** icon from the pop-up toolbar.

List

The List feature allows you to organize and display content in a structured, itemized format within your email templates. This is particularly useful for presenting information in a clear, easy-to-read manner.

A company is launching a new product and wants to send out a promotional email to its customers. To highlight the key features of the product, they use the List feature in the email template. This allows them to organize the product's top features, such as high performance, affordable pricing, eco-friendly design, and advanced technology, in a clear and structured format. The use of bullet points makes the information easy to read, ensuring that customers quickly grasp the product's benefits.

To add a list, follow the below steps:

1. Go to the **Insert** tab.
2. Drag the **list** control from the Controls toolbar and then place it on the desired section. The Table Properties dialog appears.
3. Enter the following details in the corresponding fields:

Property	Description
List Type	Allows you to choose between two list types: Bullet or Numbering.
Bullet Options	For the bullet type, choose from a Disc, Circle, or Square.
Numbering Options	For the numbering type, choose from 123, abc, ABC, i ii iii, or I II III.
Font Name	Select the font style to apply to the list items.
Font Color	Allows you to choose the text color for the list items.
Alignment	Allows you to set the alignment of the list items: Left, Center, or Right.
List Item Spacing	Allows you to adjust the vertical spacing between each list item.
List Item Indent	Allows you to control the indentation level of the list items, determining how far the items are indented from the left margin.

Property	Description
Line Height	Allows you to adjust the space between lines within each list item.
Letter Spacing	Allows you to control the spacing between characters in the list items.
Block Padding	Allows you to adjust the padding around the entire list block. You can apply uniform padding using All Padding or specify individual values for Left, Right, Top, and Bottom padding.

4. Click **Save** to confirm.

Moving a list

To move a list control from one position to another within the template, follow the below steps:

1. Select the list control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Copying a list

To copy a list control, follow the below steps:

1. Select the list control. A pop-up toolbar appears.
2. Click the **Copy** icon from the toolbar.
   The control gets copied.

Component

A component is a reusable piece of content that you can use across multiple templates. This saves you both time and effort and ensures a consistent look over templates. For more information, see Working with components.

To add a component, select the required section on the design canvas. Go to the **Insert** tab and click the **Make Components** control from the Controls toolbar. A Select Components dialog appears. Here, you can select the type of component you want to create. It can either be a Local Component or an Enterprise Component. Then, click **Save** to confirm. The component gets created. It includes all the controls in the selected section. For more information about the component types, see Types of component.

You cannot add a pre-existing component to the template.

A component supports all the formatting options and controls you apply to an email template. For more information, see Adding an email template.

- **Formatting options** — The File menu consists of a formatting toolbar that provides various formatting options to modify the font size, color, alignment, and style.
- **Controls** — The Insert menu consists of a Controls toolbar that allows you to insert text, images, links, buttons, and other controls to the component.

You can then click **Save** to confirm the changes.

This topic provides details about the different operations you can apply to a Component control:

- Moving a component
- Unlinking a component
- Deleting a component

Moving a component

To move a component from one position to another within the template, follow the below steps:

1. Select the Component control. A pop-up toolbar appears.
2. Click and hold the **Move** icon from the toolbar and drop it to the new location.

Unlinking a component

You can delink the component to reuse the same component design on the canvas.

To unlink a component, follow the below steps:

1. Select the Component control. A pop-up toolbar appears.
2. Click the **Unlink Component** icon from the toolbar.
   The image gets copied.

Deleting a component

To remove a component from the template, select the required Component control on the template and then click the **Delete** icon from the pop-up toolbar.

Related topic(s)

- Working with components
- Working with component gallery

Letter template

The letter template supports the following controls.

- Rich text
- Table
- Image
- Charts
- Shape
- Arithmetic expression
- Barcode
- Password
- Annexure configuration
- Watermark configuration
- Digital signature
- Paragraph
- Page break
- Component

When you add controls to the template, you can perform various operations on it. Although the list of operations for each control varies.

Rich text

Use the Rich Text control to display formatted text in a template. You can apply text formatting to highlight or emphasize the text by changing the text font and size, specifying the font color, applying letter and paragraph spacing, setting block padding, and more.

To add text, go to the **Insert** tab. Select the **Rich Text** control from the Controls toolbar and click anywhere in the design canvas. The rich text gets added. This topic provides details about the properties and various operations you can apply to a Rich Text control:

- Configuring text properties
- Setting padding
- Adding a system field
- Adding a macro field
- Adding a hyperlink

Configuring text properties

To configure text properties, follow the below steps:

1. On the design canvas, right-click the rich text control.
2. Select **Properties** from the context menu.
   The Textbox Properties dialog appears.
3. Specify the following properties:

Property	Description
Border Width	Specify the border width for the Rich Text control. The entered value must be in the range of 1 to 6.
Border Color	Specify the border color for the Rich Text control using the color palette or enter the color name with a hexadecimal value. For example, #ffffff.
Apply Indentation	Select to enable indentation for the text within the Rich Text control.

4. Click **Save** to confirm.

Setting padding

To set padding for the control, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Set Padding** from the context menu.
   The Set Padding dialog appears.
3. Specify the top padding for the control's top border in pixels.
4. Specify the left padding for the control left border in pixels.
5. Click **Set** to save.

Adding a system field

There are eight system fields in OmniOMS Communication Designer that are statement date, current date and time, current date, current time, current time new, current page, total pages, and total pages in words.

To add a system field within control, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Add System Fields** from the context menu. A list of supported system fields appears.
3. Select the required system fields from the list.

System field	Description
Statement Date	Returns the template generation date.
Current Date Time	Returns the current system date and time in dd-MM-yyyy hh:mm:ss format.
Current Date	Returns the current system date in dd-MM-yy format.
Current Time	Returns the current system time in hh:mm:ss format.
Current Time New	Returns the current system time in hh:mm:ss a zzz format.
Current Page	Returns the current page of the letter template.
Total Pages	Return the total number of pages in the letter template.
Total Pages in words	Return the total number of pages in the letter template in words.

The system field gets added.

Adding a macro field

A macro field is a field in the linked dataset. You can add macro fields in the rich text control to show dynamic content. For example, you can insert macro fields to display an employee's name, address, phone, designation, and other details in the email.

To add a macro field, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Add Macro** option from the list.
   The Dataset Field dialog appears.
3. Select the table name from the dropdown list.
4. Select the column name from the dropdown list.
5. Click **OK**.

Adding a hyperlink

Insert hyperlinks to link the text with a web page.

To add a hyperlink, follow the below steps:

1. Select the required text within the control.
2. Right-click the selected text and then select **Add Hyperlink** option from the context menu.
   The Add Hyperlink dialog appears.
3. Enter the name of the hyperlink. By default, the selected text appears in this field.
4. Then, specify the target link.
5. Click **Save** to confirm.

Related topic(s)

- Defining and managing rules
- Adding arithmetic expression

Table

Use the table control in your letter template to display data in tabular format. A table is composed of rows and columns. You can add or remove the rows and columns from the table. You can also adjust the column size. Apart from this, you can also display dynamic content, merge the table cells, add table headers, and others.

To add a table, go to the Insert tab. Select the **Table** control from the Controls toolbar and click anywhere in the design canvas to open the Table Properties dialog. This topic covers the following sections:

- Configuring table properties
- Configuring advanced table properties
- Setting table border
- Setting table dimension
- Setting a cell border
- Specify table padding
- Adjusting cell text rotation
- Merging table cells
- Adding a system field
- Adding a macro field
- Adding a hyperlink
- Adding table elements

Configuring table properties

You can configure the table settings in the Structure tab of the Table Properties dialog.

Property	Description
Table Name	Specify the name of the table. The table must have a unique name within a template.
Column Information	
Equalize Width	Enable the toggle to allow the auto-distribution of column width within the table. The sum of all the column widths must be 100 percent.

Property	Description
+New Column	By default, there are two columns in the table. You can add more columns by clicking the **+ New Column**. Additionally, you can modify the column width and apply rules to the columns. For more information, see Defining and managing rules.
Rows Information	
Insert After Selected Row	Choose this option to add a new row below the selected row in the Row Information section, and then click **+ Add New Row**. Additionally, you can apply rules to the added rows.
Insert Before Selected Row	Choose this option to add a new row before the selected row in the Row Information section, and then click **+ Add New Row**. Additionally, you can apply rules to the added rows.
Allow Header	Enable this toggle switch to set the table header properties. You cannot select a row as a dynamic row that is enabled with the Allow Header option.
Starting Row	Select a suitable row to use as the starting row for the header.
Ending Row	Select a suitable row to use as the ending row for the header.
Attributes	It consists of the following attributes: • **Create table header on each page** — In the case of an overflowing table, use this option to repeat the table headers on each page. • **Suppress table header for blank rows** — Use this option to suppress the header rows with no data.

Configuring advanced table properties

You can configure the advanced table settings in the Advanced Options tab of the Table Properties dialog. There are three categories available:

- Dynamic properties
- Auto adjust property
- Table transpose

Dyanmic properties

Configure settings to display dynamic content in your table, such as enabling dynamic rows and setting numbering formats.

Property	Description
Dynamic Table	Enable the toggle to display dynamic content in the table. The rows within a table are dynamic in nature as they depend on the data in the linked dataset.
Detail Row	Select a suitable row from the dropdown list to show dynamic content in the table.
Table Name	Select a suitable dataset field from the dropdown list. New rows are added dynamically to the table based on the data in the linked dataset.
Numbering	Select a suitable numbering format for the dynamic table row. It can be any of the following: • 1, 2, 3.. • A, B, C.. • a, b, c.. • I, II, III.. • i, ii, iii..
Multi Color Rows	Turn on the toggle to add background colors to alternate rows for improved readability. When the toggle is on, choose a color from the palette or enter a hexadecimal color code, then click the **Add button** to apply the color. Alternate rows reflect the selected colors.

Auto adjust property

Adjust the table's row and column properties automatically based on content, page space, and custom conditions to ensure optimal layout.

Rows tab

Property	Description
Start From New Page	Select this checkbox to ensure the table row starts from a new page.

Property	Description
Always adjust row height automatically	Select this button to automatically adjust the row height.
If space on the page is less than	Select this button and enter the value for adjusting the row height if space is limited.
If space left on the page	Select this button and enter the value for adjusting the row height based on the remaining space.
Reduce Table Size	Select this checkbox and enter the percentage. If the space occupied on the last page is less than the specified percentage, reduce the font size by the specified points.
Spill Row on Page Split	Select this checkbox to allow rows to spill over onto the next page.

Columns tab

Property	Description
Auto Adjust by Content	Select this checkbox to automatically adjust columns based on content. Enter the columns to be suppressed in the provided text box.
Auto Adjust by Width	Select this checkbox to automatically adjust columns based on width.

Table transpose

Transpose your table, turning existing rows into columns. Customize the width of the transposed rows for better presentation.

Property	Description
Enable Transpose	Toggle the button to enable table transpose.
Equalize Width	When the transpose is enabled, existing rows become columns in the transposed table. Enable this toggle to equalize the width for the transposed rows.

Setting table border

To set the table borders, follow the below steps:

1. Click anywhere in the table.

2. Go to the **Table** tab, and click **Table Border**.
   The Table Border dialog appears.
3. Enter the following details in the dialog:

Property	Description
Line Width	Specify the width of the table border.
Line Color	Specify the cell border color using the color palette or enter the color name using a hexadecimal value.
Border Color	Specify the table border color using the color palette or enter the color name using a hexadecimal value.
Round Corner	Select this option for rounded table borders.

4. Click **Save**.

Setting table dimension

To set the dimensions of the table, follow the below steps:

1. On the design canvas, right-click anywhere in the table and then select **Set Element Dimension** from the list.
   The Set Dimensions dialog appears.
2. Specify the height and width of the table dimensions (in pixels).
3. Click **Save**.

Setting a cell border

To set the table cell border, follow the below steps:

1. On the design canvas, place the cursor on the required table cell.
2. Press the **Shift** key and the left mouse button.
   The table cell gets selected.
3. Go to the **Table** tab, and select **Cell Border**.
   The Cell Border dialog appears.
4. Enter the following information in the dialog:

Property	Description
Border Width	Specify the border width for the table cell.

Property	Description
Border Color	Specify the table border color using the color palette or enter the color name using a hexadecimal value.
Border Style	Select the table side on which you want to apply the border. It can be a left border, right border, top border, and bottom border.

5. Click **Save**.

Specify table padding

To set table padding, follow the below steps:

1. On the design canvas, place the cursor on the required table.
2. Go to the **Table** tab and then select **Padding**.
   The Set Padding dialog appears.
3. Select the padding type. It can be any of the following:
   - **All** — Select this option to apply the padding on all the table sides. Then, enter the padding value in pixels.
   - **Individual** — Select this option to apply the different padding on the sides. Then enter the padding value for each side in pixels.

> The padding value must lie in the range of 1 to 100 pixels.

4. Click **Save**.

Adjusting cell text rotation

To set the text rotation in the table cell, follow the below steps:

1. On the design canvas, place the cursor on the required table.
2. Go to the **Table** tab and then select the **Cell Text Rotation** dropdown.
3. Select any of the following options from the dropdown:
   - **0°** — Select this option to rotate the text in the table to 0 degrees.
   - **90°** — Select this option to rotate the text in the table to 90 degrees.
   - **180°** — Select this option to rotate the text in the table to 180 degrees.
   - **270°** — Select this option to rotate the text in the table to 270 degrees.

   The cell text now appears based on the chosen value during the preview.

Merging table cells

To merge the table cells, follow the below steps:

1. On the design canvas, select the required table cells by pressing the Shift key and left-mouse click.
2. Go to the **Table** tab and then select **Merge Cells**.
   The cells are now merged.
   To unmerge the cells, select the merged cell by pressing the Shift key and left-mouse click. Then, go to the Table tab and select **Unmerge Cells**.

Adding a system field

To add a system field within control, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Add System Fields** from the context menu. A list of supported system fields appears.
3. Select the required system fields from the list.

System field	Description
Statement Date	Returns the template generation date.
Current Date Time	Returns the current system date and time in dd-MM-yyyy hh:mm:ss format.
Current Date	Returns the current system date in dd-MM-yy format.
Current Time	Returns the current system time in hh:mm:ss format.
Current Time New	Returns the current system time in hh:mm:ss a zzz format.
Detail Row Number	Returns the row number of the current detail row in the table.

The system field gets added.

Adding a macro field

A macro field is a field in the linked dataset. You can add macro fields in the rich text control to show dynamic content. For example, you can insert macro fields to display an employee's name, address, phone, designation, and other details in the email.

To add a macro field, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Add Macro** option from the list.
   The Dataset Field dialog appears.
3. Select the table name from the dropdown list.
4. Select the column name from the dropdown list.
5. Click **OK**.

Adding a hyperlink

Insert hyperlinks to link the text with a web page.

To add a hyperlink, follow the below steps:

1. Select the required text within the control.
2. Right-click the selected text and then select **Add Hyperlink** option from the context menu.
   The Add Hyperlink dialog appears.
3. Enter the name of the hyperlink. By default, the selected text appears in this field.
4. Then, specify the target link.
5. Click **Save** to confirm.

Adding table elements

You can enhance your table by adding various elements such as text, images, barcodes, data fields, aggregate data, and external content. Each element can be added by selecting the appropriate option from the dropdown menu in the table header bar.

Text

Add formatted text to your table cells for better presentation.

To add text to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **Text**.
3. Click the required cell. The Text Properties dialog appears with the following options:

Property	Description
Content	White space to write the text with the following options to edit the text: • **Font** — Select the font type. • **Font Size** — Select the font size. • **Bold** — Make the text bold. • **Italics** — Italicize the text. • **Underline** — Underline the text. • **Font Color** — Choose the font color. • **Background Color** — Choose the background color.
Text Rotation	Select the text rotation angle from the dropdown (0, 90, 180, 270).
Attributes	**Apply Indentation** — Checkbox to apply indentation. **Running Direction** — Checkbox to set text running direction from right to left.

4. Click **Save**.

Image

Add images to your table cells to visually represent data or enhance the appearance of your table.

To add an image to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select Image.
3. Click the required cell. The Image Properties dialog appears with options to configure the image settings:

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td>Image Source</td><td>Add an image using any of the following options:
Browse File — Select this option to add an image from your local system.
Input URL — Select this option to add an image using a valid URL. The supported image formats are .jpeg, and .jpg.
The image URL must be accessible to the application server.
The image URL must end with a "." followed by its file extension.</td></tr>
<tr><td>Preview</td><td>It displays the preview of the added image.</td></tr>
</table>

4. Click **Add**.

Barcode

Insert barcodes into your table cells to include scannable information.

To add a barcode to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **Barcode**.
3. Click the required cell. The Barcode Properties dialog appears with options to configure the barcode settings. To configure the Barcode, see Barcode

Data field

Add data fields to your table cells to dynamically display data from your dataset.

To add a data field to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **Data Field**.
3. Click the required cell. The Data Field Properties dialog appears with the following options:

Property	Description
Table	Select the dataset table from the dropdown menu.
Column	Select the dataset column from the dropdown menu.

Property	Description
Attributes	• **Running Direction** — Checkbox to set text running direction from right to left. • **Regional Language** — Checkbox to enable regional language support. • **Enable HTML Content** — Checkbox to enable HTML content

4. Click **Add**.

Aggregate data

Include aggregate data such as sums or averages in your table cells.

To add aggregate data to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **Aggregate Data**.
3. Click the required cell. The Aggregate Data Properties dialog appears with the following options:

Property	Description
Aggregate Function	Select an aggregate function from the dropdown (Sum, Average, Minimum, Maximum, Count, First Entry, Last Entry)
DB Fields	Select the database fields from the dropdown menu.
Decimal	Enter the number of decimal places
Attributes	• **Convert to Words** — Checkbox to convert numbers to words. • **Use() for Negative** — Checkbox to use parentheses for negative values.
Comma Separator	Toggle to enable comma separation. When enabled, the following option appears
Number Format	Select the number format (International or Indian) using the radio button.

4. Click **Add**.

External content

Embed external content into your table cells to enhance the information provided.

To add external content to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **External Content**.
3. Click the required cell. The External Content Properties dialog appears with the following options:

Property	Description
Content Type	Shows external content.
Type	Select the content type from the dropdown (RTF, HTML).
Label Name	Select the label name for the external content.

4. Click Add.

Related topic(s)

- Defining and managing rules
- Arithmetic expression

Image

Use the Image control to embed an image into the Letter template.

To add image, go to the **Insert** tab. Select the **Image** control from the Controls toolbar and click anywhere in the design canvas. An Add Image dialog appears where you can configure its related properties. This topic provides details about the properties and various operations you can apply to an Image control:

- Configuring image properties
- Setting dimensions
- Adding a hyperlink
- Adding a dynamic content
- Enabling image tracking

Configuring image properties

You can configure the image properties in the Add Image dialog.

Property	Description
Image Source	Add an image using any of the following options: • **Browse File** — Select this option to add an image from your local system. • **Image URL** — Select this option to add an image using a valid URL. The supported image formats are .jpeg, and .jpg. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension.
Preview	It displays the preview of the added image.
Proxy Setting *(Optional)*	It allows you to enable or disable the proxy settings for the server. Turn the toggle on to enable the proxy settings and then enter a valid server IP address and port describing the image location.

Setting dimensions

To set image dimensions, follow the below steps:

1. On the design canvas, right-click the required image.
2. Select **Set Element Dimension** from the context menu.
   The Set Dimensions dialog appears.
3. Enable the **Lock Aspect Ratio** toggle to maintain the aspect ratio of the image.
4. Specify the height and width of the image in pixels.

   The width and height of the image must be in the range of 20 to 1009 pixels.

5. Click **Save**.

Adding a hyperlink

Add links to an image to provide additional information.

To add a hyperlink to an image, follow the below steps:

1. On the design canvas, right-click the image.
2. Select **Add Hyperlink** from the context menu.
   The Add Hyperlink dialog appears.
3. Select the **Use Hyperlink in HTML Output** checkbox to activate the link specified in the Target field.
4. Enter the target URL for the image, which is an anchor link to another web page.
   On clicking the image during the preview, you get directed to the required link.
5. Click **Save**.
   The hyperlink is added to the image. You can modify the added hyperlink by right-clicking the image and selecting **Edit Hyperlink** from the context menu.

Adding dynamic content

OmniOMS Communication Designer allows you to define dynamic content images. These images are useful while defining conditional logic within a decision table. For more information, see Defining a decision table.

To use the image name as dynamic content in the template, follow the below steps:

1. On the design canvas, right-click the Image control.

2. Select **Add Dynamic content** from the context menu.
   The Add Dynamic content dialog appears.
3. In the **Display Name** field, enter the image name.
4. Click **Add**.
   The dynamic content gets added.

Once the image name gets added, you can use it as dynamic content. If you want to remove the dynamic content from the Image control, right-click the Image control and select **Remove Dynamic Content** from the context menu.

Enabling image tracking

Enable the image tracking feature to keep track of users who accessed the image. To enable the feature, right-click the Image control on the design canvas and then select **Enable tracking** from the context menu. The image tracking gets enabled.

You can also disable the image tracking by right-clicking the Image control and selecting **Disable Tracking** from the context menu.

Related topic(s)

- Defining and managing rules
- Defining decision table

Charts

You can enhance your templates by adding various types of charts to visualize data effectively. This feature allows you to insert and configure charts directly within the design canvas.

To add a chart, go to the **Insert** tab. Select the **Charts** control from the Controls toolbar and click anywhere in the design canvas. A Charts Properties dialog appears where you can configure its related properties. The Charts Properties dialog consists of the following sections:

Selecting Chart Type

On the left pane, you can select the chart type from the following options:

- Column

- Column Range
- Bar
- Area
- Line
- Line & Column
- Donut
- Semi Donut
- Pie
- Scatter
- Cylinder

Previewing the Chart

The Preview section shows how your chart looks with the current settings. This helps you adjust configurations in real time to meet your design needs. After selecting your chart type and configuring its properties in the Sourcing, Basic, and Advanced tabs, navigate to the Preview section to see the chart based on the current configurations.

Configuring chart properties

On the right pane, there are following tabs:

- Data Source
- Basic
- Advanced

Data source tab

Configure the data sources for the chart axes. The tab consists of the following options:

Field	Description
X-axis source	Allows you to select the data source for the X-axis of the chart.
Y-axis source	Allows you to select the data source for the Y-axis of the chart. For adding Y-axis, see Adding Series.

Adding series

To add series in the chart, perform the following steps:

1. On the source tab, click **+Add Series**. The Add Series dialog appears with the following options:

Field	Description
Series Name	Allows you to set the name of the series.
Source Name	Allows you to select the data source for the series.
Min Value	Allows you to set the minimum value for the series. This option is available only in column range charts.
Max Value	Allows you to set the maximum value for the series. This option is available only in column range charts.
X-Axis Value	Allows you to set the X-axis value for the series. This option is available only in scatter charts.
Y-Axis Value	Allows you to set the Y-axis value for the series. This option is available only in scatter charts.
Color	Allows you to set the color of the series.
Enable Marker	Allows you to enable markers for the series. This toggle button, when turned on, reveals four additional options. It is available in line charts and line & column charts. In scatter charts, it is enabled by default.
Symbol Type	Allows you to select the symbol type for the markers.
Line Width	Allows you to set the width of the line in the series.
Line Color	Allows you to set the color of the line in the series.
Fill Color	Allows you to set the fill color of the markers.

2. Click **Add** to add the series to the chart.

Basic tab

Set the fundamental properties and appearance of the chart. The tab consist of the following options:

Field	Description
Title	Allows you to set the main title of the chart.
Subtitle	Allows you to set a subtitle for the chart.
X-axis title	Allows you to set a title for the X-axis. This option is not available for donut, semi donut, and pie charts.

Field	Description
Y-axis title	Allows you to set a title for the Y-axis. This option is not available for donut, semi donut, and pie charts.
Primary Title	This option is only available for the line & column chart, allowing you to set a title for the primary Y-axis.
Sec. Title	This option is only available for the line & column chart, allowing you to set a title for the secondary Y-axis.
Show Legend	Allows you to display the legend on the chart. The following are the options available: • Horizontal — Displays the legend horizontally. • Vertical — Displays the legend vertically. • Proximate — Displays the legend in close proximity to the data.
Data Labels	Allows you to enable or disable data labels on the chart.
3D Options	Allows you to enable or disable 3D effects for the chart. This option is available only for column, donut, pie, and cylinder charts.
Stacking	Allows you to enable or disable data stacking in the chart. This option is available for column, bar, and cylinder charts.
Zones	Allows you to configure specific zones in the chart. This option is not available for column range, pie, donut, and semi donut charts.

Advanced tab

Customize detailed properties for text, axes, legend, chart area, and plot options. The advanced tab provides more granular control over the chart's appearance and behavior, categorized into:

- Text Properties — Configure font style, size, and color for the chart text.
- Axis Properties — Configure the appearance and behavior of the X and Y axes.
- Legend Properties — Customize the appearance and position of the chart legend.
- Chart Area — Configure the background color, border, and other properties of the chart area.
- Plot Options — Customize the data plot area, including line styles, marker styles, and other plot-specific options.
- Data Labels — Configure the appearance and position of data labels within the chart.

- 3D options — Add depth and a three-dimensional perspective to the chart, available for specific chart types.

Text properties

The Text properties consist of three sections: Title, Subtitle, and Base Font.

Title

Field	Description
Font Name	Allows you to select the font for the chart title.
Font Color	Allows you to choose the color of the title text.
Font Style	Allows you to apply styles such as bold, italic, and underline to the title text.
X-position	Allows you to set the horizontal position of the title.
Y-position	Allows you to set the vertical position of the title.
Margin	Allows you to set the margin around the title in pixels.
Use Floating	Allows you to enable or disable the floating position of the title.

Subtitle

Field	Description
Font Name	Allows you to select the font for the chart subtitle.
Font Color	Allows you to choose the color of the subtitle text.
Font Style	Allows you to apply styles such as bold, italic, and underline to the subtitle text.
X-position	Allows you to set the horizontal position of the title.
Y-position	Allows you to set the vertical position of the title.
Use Floating	Checkbox: Allows you to enable or disable the floating position of the subtitle.

Base font

Field	Description
Use same font for Axis, Legends & Data Labels	Allows you to apply the same font settings for the axis labels, legends, and data labels.
Font Name	Allows you to select the base font for axis labels, legends, and data labels.
Font Color	Allows you to choose the base color for the text of axis labels, legends, and data labels.
Font Style	Allows you to apply styles such as bold, italic, and underline to the base text of axis labels, legends, and data labels.

Axis properties

The Axis Properties section allows you to customize the X-Axis and Y-Axis of your chart. This option is not available for Donut, Semi Donut, and Pie charts.

X-Axis

Field	Description
Font Name	Allows you to select the font for the X-Axis labels.
Font Color	Allows you to choose the color of the X-Axis labels.
Font Style	Allows you to apply styles such as bold, italic, and underline to the X-Axis labels.
Lower Bound	Allows you to set the lower bound value for the X-Axis.
Upper Bound	Allows you to set the upper bound value for the X-Axis.
Tick Position	Allows you to specify the position of the ticks on the X-Axis.
Tick Interval	Allows you to set the interval between the ticks on the X-Axis.
Format Value	Allows you to format the values displayed on the X-Axis.
Title Rotation	Allows you to rotate the X-Axis title.
Title Margin	Allows you to set the margin around the X-Axis title.
Label Rotation	Allows you to rotate the labels on the X-Axis.
Label Color	Allows you to choose the color of the X-Axis labels.

Y-Axis

The Y-Axis properties have the same fields and descriptions as the X-Axis.

> For Line and Column charts, additional features include Y-Axis (Primary) and Y-Axis (Secondary) with the same fields and descriptions as listed above.

Legend properties

The Legend Properties section allows you to customize the title, text, and symbol of your chart's legend. It consists of three sections: Title, Text, and Symbol.

Title

Field	Description
Legend Title	Allows you to specify a title for the legend.
Font Name	Allows you to select the font for the legend title.
Font Color	Allows you to choose the color of the legend title.
Font Style	Allows you to apply styles such as bold, italic, and underline to the legend title.
Horizontal Align Option	Allows you to align the legend title horizontally.
Vertical Align Option	Allows you to align the legend title vertically.
X-position	Allows you to set the horizontal position of the legend title.
Y-position	Allows you to set the vertical position of the legend title.
Use floating	Enables the legend title to float over the chart, allowing for flexible placement.

Text

Field	Description
Font Name	Allows you to select the font for the legend text.
Font Color	Allows you to choose the color of the legend text.
Font Style	Allows you to apply styles such as bold, italic, and underline to the legend text.
Padding	Allows you to set the padding around the legend text.

Field	Description
Margin Top	Allows you to set the top margin around the legend text.
Margin Bottom	Allows you to set the bottom margin around the legend text.

Symbol

Field	Description
Square Symbol	Allows you to enable or disable the use of square symbols in the legend. This option is not available for Line and Line & Column charts.
Height	Allows you to set the height of the legend symbols.
Width	Allows you to set the width of the legend symbols.
Radius	Allows you to set the corner radius of the legend symbols, making them rounded if needed.
Padding	Allows you to set the padding around the legend symbols.

Chart area

The Chart area section allows you to customize the appearance and layout of the chart's plotting area and overall chart border.

Field	Description
Plot Border Width	Allows you to set the width of the plot border. This option is not available for Donut, Semi Donut, and Pie charts.
Plot Border Color	Allows you to choose the color of the plot border.
Area Color	Allows you to set the color of the chart's plotting area.
Invert Axis	Allows you to invert the axis. This option is not available for Bar, Donut, Semi Donut, Pie, and Scatter charts.
Chart Border	
Width	Allows you to set the width of the chart border.
Radius	Allows you to set the corner radius of the chart border, making it rounded if needed.
Border Color	Allows you to choose the color of the chart border.
Chart Padding	

Field	Description
Enable Padding	Enables padding around the chart.
Left	Allows you to set the left padding of the chart.
Right	Allows you to set the right padding of the chart.
Top	Allows you to set the top padding of the chart.
Bottom	Allows you to set the bottom padding of the chart.

Data labels

The Data Labels section allows you to customize the appearance and position of the labels displayed on the chart's data points.

Field	Description
Font Name	Allows you to set the font name for the data labels.
Font Color	Allows you to choose the color of the data labels' text.
Font Style	Allows you to apply styles such as bold, italic, and underline for the data labels.
Horizontal	Allows you to set the horizontal alignment of the data labels.
Vertical	Allows you to set the vertical alignment of the data labels.
Border Width	Allows you to set the width of the border around the data labels.
Border Radius	Allows you to set the radius of the border corners, making them rounded if needed.
Border Color	Allows you to choose the color of the border around the data labels.
X-Position	Allows you to set the X-axis position of the data labels.
Y-Position	Allows you to set the Y-axis position of the data labels.
Distance	Allows you to set the distance of the data labels from the data points. This option is only available for Donut, Pie, and Semi Donut charts.

3D options

The 3D Options section allows you to add a three-dimensional effect to your charts. This option is available for Column Chart, Donut Chart, Pie Chart, and Cylinder Chart only.

Field	Description
Alpha Angle	Allows you to set the alpha angle for the 3D effect, which adjusts the tilt of the chart.
Beta Angle	Allows you to set the beta angle for the 3D effect, which adjusts the rotation of the chart.
Chart Depth	Allows you to set the depth of the chart, giving it a 3D appearance. This option is only available for Column Chart and Cylinder Chart.
View Distance	Allows you to set the distance from which the chart is viewed, affecting the perspective of the 3D effect. This option is only available for Column Chart and Cylinder Chart.

Plot option

The Plot Options section allows you to customize the appearance and behavior of your charts. This option is not available for the Area Chart.

Field	Description
Bar Width	Allows you to set the width of the bars. Available in Column Chart, Bar Chart, Line & Column Chart, and Cylinder Chart.
Border Width	Allows you to set the width of the border around the plot.
Border Color	Allows you to set the color of the border. This option is not available for Line Chart.
Line Width	Allows you to set the width of the lines. Available only for Line Chart and Line & Column Chart.
Center Start	Allows you to set the starting point of the center for Donut Chart, Semi Donut Chart, and Pie Chart.
Center End	Allows you to set the ending point of the center for Donut Chart, Semi Donut Chart, and Pie Chart.
Chart Size	Allows you to set the overall size of the chart. Available for Donut Chart, Semi Donut Chart, and Pie Chart.
Inner Size	Allows you to set the inner size of the chart. Available for Donut Chart and Semi Donut Chart.
Depth	Allows you to set the depth of the chart, giving it a 3D effect. This option is only available for Pie Chart.

Shape

OmniOMS Communication Designer allows you to insert shapes in your email template, such as rectangles, lines, and circles. You can further configure the properties to enhance their appearance.

To add shape, go to the **Insert** tab. From the Controls toolbar, click the **Shape** control and then select the required shape type from the list. Click anywhere in the design canvas to insert the chosen shape. This topic provides details about the properties and various operations you can apply to a Shape control:

- Configuring rectangle properties
- Configuring line properties
- Configuring circle properties
- Setting padding

Configuring rectangle properties

To set properties for a rectangle, right-click the rectangle and then select **Properties** from the context menu to open the Rectangle Properties dialog.

Property	Description
Border width	Specify the border width of the rectangle. The border width must lie in the range of 1 to 6 pixels.
Border color *(Optional)*	Specify the border color of the rectangle using the color palette or enter the color name using a hexadecimal value. For example, #ffffff.

Configuring line properties

To set properties for a line, right-click the line on the design canvas and then select Properties from the context menu to open the Properties dialog.

Property	Description
Left Start	Enter the starting point of the line from the left of the page.
Top Start	Enter the starting point of the line from the top of the page.

Property	Description
Left End	Enter the ending point of the line from the left of the page.
Top End	Enter the ending point of the line from the top of the page.
Border Width	Specify the border width of the line. The border width must lie in the range of 1 to 6 pixels.
Border Color (Optional)	Specify the border color of the rectangle using the color palette or enter the color name with a hexadecimal value. For example, #ffffff.

Configuring circle properties

To set properties for a circle, right-click the circle on the design canvas and then select **Properties** from the context menu to open the Properties dialog.

Property	Description
Top	Specify the margin area on the top of the circle.
Left	Specify the margin area on the left of the circle.
Boder Width	Specify the border width of the circle. The border width must lie in the range of 1 to 6 pixels.
Border Color (Optional)	Specify the border color of the rectangle using the color palette or enter the color name with a hexadecimal value. For example, #ffffff.
Circle Radius	Specify the radius of the circle. The circle radius cannot be greater than the design canvas.

Setting padding

To set padding for a rectangle, follow the below steps:

1. On the design canvas, right-click the required rectangle.
2. Select **Set Padding** from the context menu.
   The Set Padding dialog appears.
3. Specify the top padding for the rectangle's top border in pixels.
4. Specify the left padding for the rectangle's left border in pixels.
5. Click **Set** to save.

Arithmetic expression

OmniOMS allows you to define and use arithmetic expressions within a letter template. An arithmetic expression is a combination of numbers, arithmetic operators, such as addition, subtraction, division, and multiplication, and parenthesis. You can use this feature to calculate numeric data in your template. For example, you can create a simple arithmetic expression to calculate the simple interest on a fixed deposit.

```
Simple Interest = (Principle*Rate *Time)/100
```

To add text, go to the **Insert** tab. Select the **Arithmetic Expression** control from the Controls toolbar and click anywhere in the design canvas. This topic provides details about the properties and various operations you can apply to an Arithmetic Expression control:

- Creating an arithmetic expression
- Adding an arithmetic expression
- Setting padding
- Adding a system field
- Adding a macro field
- Adding a hyperlink

Creating an arithmetic expression

1. In the Arithmetic Expression Library dialog, click **New Arithmetic Expression**.
   A New Arithmetic Expression dialog appears consisting of two sections — Data Fields and Expressions. In the Data Fields section, you can view the linked dataset, and added expressions appear under the Expressions section.
2. From the Data Fields section, select the required field. The dataset field gets added in the Expression area.
3. Select the operator you want to use in the expression.
4. *(Optional)* Repeat steps 2 to 3 to create an expression.
5. Enter the name of the expression.
6. Specify the number of decimal places for the expression resultant value.
   You can set up to six decimal points for the resultant value.
7. Specify the data format for the expression resultant value. It can be any of the following:

- **International** — The resultant value is rendered in the 999, 999, 999, 999 format.
- **Indian** — The resultant value is rendered in the 99, 99, 99, 999 format.
- **Convert to Words** — The resultant value is rendered in words.

8. Click **Add**.
   The expression gets added to the Arithmetic Expression Library.

Adding an arithmetic expression

You can add arithmetic expressions by right-clicking the control and selecting **Add Arithmetic Expression** from the context menu. The Arithmetic Expression Library dialog appears.

> You can add arithmetic expressions to rich text, paragraph, table, and arithmetic expression controls.

To add an arithmetic expression, follow the below steps:

1. From the Expression List, select the required expression.
   On selecting the expression, the expression details are automatically filled with values.
2. To specify an action or message to display when a calculation error occurs, click the edit icon next to the Error action for all expressions field.
   The Error Action dialog appears.
3. Select a suitable action name from the dropdown list. It can be any of the following:
   - **Display Blank** — Select this option to display blank space in case of a calculation error.
   - **Do not generate template** — Select this option to avoid template generation in case of a calculation error.
   - **Custom Message** — Select this option to display a custom message in case of a calculation error.
     Enter the message in the Custom Message area.

     > The Custom Message area is disabled in the case of Display Blank and Do not generate template options.
4. Click **Save** to confirm.

Setting padding

To set padding for the control, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Set Padding** from the context menu.
   The Set Padding dialog appears.
3. Specify the top padding for the control's top border in pixels.
4. Specify the left padding for the control left border in pixels.
5. Click **Set** to save.

Adding a system field

There are eight system fields in OmniOMS Communication Designer that are statement date, current date and time, current date, current time, current time new, current page, total pages, and total pages in words.

To add a system field within control, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Add System Fields** from the context menu.
   A list of supported system fields appears.
3. Select the required system fields from the list.

System field	Description
Statement Date	Returns the template generation date.
Current Date Time	Returns the current system date and time in dd-MM-yyyy hh:mm:ss format.
Current Date	Returns the current system date in dd-MM-yy format.
Current Time	Returns the current system time in hh:mm:ss format.
Current Time New	Returns the current system time in hh:mm:ss a zzz format.
Current Page	Returns the current page of the letter template.
Total Pages	Return the total number of pages in the letter template.
Total Pages in words	Return the total number of pages in the letter template in words.

The system field gets added.

Adding a macro field

A macro field is a field in the linked dataset. You can add macro fields in the rich text control to show dynamic content. For example, you can insert macro fields to display an employee's name, address, phone, designation, and other details in the email.

To add a macro field, follow the below steps:

1. On the design canvas, right-click the required control.
2. Select **Add Macro** option from the list.
   The Dataset Field dialog appears.
3. Select the table name from the dropdown list.
4. Select the column name from the dropdown list.
5. Click **OK**.

Adding a hyperlink

Insert hyperlinks to link the text with a web page.

To add a hyperlink, follow the below steps:

1. Select the required text within the control.
2. Right-click the selected text and then select **Add Hyperlink** option from the context menu.
   The Add Hyperlink dialog appears.
3. Enter the name of the hyperlink. By default, the selected text appears in this field.
4. Then, specify the target link.
5. Click **Save** to confirm.

Related topic(s)

Defining and managing rules

Barcode

Add barcodes to your letter template for data tracking and storing purposes. OmniOMS Communication Designer offers various 1-D and 2-D barcode styles to use. You can store static text, system fields, dataset fields, or any combination of these three in the barcode.

To add a barcode, go to the **Insert** tab. From the Controls toolbar, click the **Barcode** control and then click anywhere in the design canvas to open the Barcode Properties dialog. This topic provides details about the properties and various operations you can apply to a Barcode control:

- Configuring 1-D barcode properties
- Configuring 2-D barcode properties
- Changing content sequence

Configuring 1-D barcode properties

To set properties for a 1-D barcode, right-click the barcode and then select Properties from the context menu to open the Barcode Properties dialog.

Property	Description
Barcode Type	Select the type of barcode. In this case, select 1 D barcode.
Encoding	Select the barcode encoding type. It can be Codabar, Code128, EAN-13, EAN-8, Interleaved 2 of 5, UPC-A, UPC-E, and USS 39. Barcode does not generate in case you select incorrect symbology.
Orientation	Select the orientation of the barcode. It can be set to portrait or landscape. By default, the orientation for the 1-D barcode type is set to Landscape.
Max. Length	The maximum length indicates the length of the barcode. This field is uneditable and picks the value based on the length defined for the added section types.

Property	Description
Attributes	Select the required barcode attributes: • Select the **Display Text Label** checkbox to display the text along with the barcode. • Select the **Append Page Number** to append the page number with the barcode text.
Printing Type	Select the printing type. It can be either of the following: • **Simplex** — Select this option to print data only on a single side of the page. • **Duplex** — Select this option to print data on both sides of the page.
Section Details	Select the data you want to store in the barcode. It can be any of the following: • **Static Text** — Select this option to store static text in the barcode. The Text Length field in case of the static text remains 0. • **Data Field** — Select this option to store data field values in the barcode. Select the required table and column name from the Table Name and Column Name dropdowns. Then, specify the starting digit and maximum length for the data field to use for the barcode. • **System Field** — Select the required system field to store in the barcode. It can be any of the following: ◦ **SYSTEM.STATEMENT_DATE** — It indicates the template generation date. ◦ **SYSTEM.STATEMENT_SEP** — It indicates the different values you want to store in the barcode depending on its position on the first page, last page, single page, or any page between the first and last ones. This is useful in case you have dynamic content to display in the PDFs, due to which barcode position may vary for each user in the PDF. By using this option, you can define the custom logic for the barcode. ◦ **SYSTEM.PDFPAGENO** — It indicates the current PDF page number. You can also specify the maximum digits for the PDF page number. For example, if the page number is 2 and the Digits field is set to 4, then 0002 gets displayed in the barcode.

The new password appears under the Added Content Details displaying the content and characters of the password. The number of password characters is automatically fetched by the system.

Configuring 2-D barcode properties

To set properties for a 2-D barcode, right-click the barcode and then select Properties from the context menu to open the Barcode Properties dialog.

Property	Description
Barcode Type	Select the type of barcode. In this case, select 2 D barcode.
Type	Select the barcode encoding type. It can be QR CODE and PDF417. Barcode does not generate in case you selected incorrect symbology.
Orientation	Select the orientation of the barcode. It is set to Portrait, by default and the value cannot be changed.
Max. Length	The maximum length indicates the length of the barcode. This field is uneditable and picks the value based on the length defined for the added section types.
Printing Type	Select the printing type. It can be either of the following: • **Simplex** — Select this option to print data only on a single side of the page. • **Duplex** — Select this option to print data on both sides of the page.
Append Hashcode	Select the **Append Hashcode** checkbox to enable encryption of the barcode. Enter the text to use for the Hashcode generation.

Property	Description
Section Details	Select the data you want to store in the barcode. It can be any of the following: • **Static Text** — Select this option to store static text in the barcode. This field is uneditable and picks the value based on the length defined for the added section types. • **Data Field** — Select this option to store data field values in the barcode. Select the required table and column name from the Table Name and Column Name dropdowns. Then, specify the starting digit and maximum length for the data field to use for the barcode. • **System Field** — Select the required system field to store in the barcode. It can be any of the following: ◦ **SYSTEM.STATEMENT_DATE** — It indicates the template generation date. ◦ **SYSTEM.STATEMENT_SEPARATOR** — It indicates the different values you want to store in the barcode depending on its position on the first page, last page, single page, or any page between the first and last ones. This is useful in case you have dynamic content to display in the PDFs, due to which barcode position may vary for each user in the PDF. By using this option, you can define the custom logic for the barcode. ◦ **SYSTEM.PDFPAGENO** — It indicates the current PDF page number. You can also specify the maximum digits for the PDF page number. For example, if the page number is 2 and the Digits field is set to 4, then 0002 gets displayed in the barcode.

The new password appears under the Added Content Details displaying the content and characters of the password. The number of password characters is automatically fetched by the system.

Changing content sequence

OmniOMS Communication Designer enables you to change the sequence of the barcode contents. This can be achieved by hovering over the required content and then using the Up and Down arrows, respectively.

Password

OmniOMS provides you with a way to secure your PDFs with a password. This can be achieved by using the Password control. This control enables you to apply a master password as well as a user-specific password based on your requirements. The master password can be used by high-level authorities to access the PDFs, however, the user password is specific to users who access the PDF.

In the Communication Designer, you can create a password using static text, system field, dataset field, or a combination of all three. Apart from this, you can also restrict the users from printing, applying encryption, copying content, modifying PDF content, and others.

- A default password with the value newgen123# is already added. You can see the default password under the Added Content Details.
- A password can have uppercase letters (A - Z), lowercase letters (a - z), numbers (1 - 9), spaces, and special characters.

To add a password, go to the **Insert** tab. From the Controls toolbar, click the **Password** control and click anywhere in the design canvas to open the Password Properties dialog. This topic provides details about the properties and various operations you can apply to Password control:

- Creating a master password
- Creating a user password
- Changing content serial

Creating a master password

You can create a master password in the Master Password tab of the Password Properties dialog.

To access a master password, you must create a user password.

Property	Description
Source Name	Select a suitable type for the source from the dropdown. It indicates the type of password you want to create. • Select **Static Text** to specify a static value for the password. • Select **Report Field** to create user-specific passwords. These passwords vary depending on the users.
Content	• In case you selected static text as the source name. Then enter the static content for the password. • In case you selected Report Field as the source name. Then, select the required report field you want to use for creating the password. The Content dropdown only shows the fields added to the template or configured in the Template Properties dialog.
Strength	Select the encryption algorithm for encrypting and decrypting passwords. It can be 40-Bits (RC4), 128-Bits (RC4), and 128-Bits (AES).
Padding Type	Select the padding type for the password. A padding character fills the empty spaces in the password with a space or special character like an asterisk or hash. • **Post Padding with *** — Select this option to fill the empty spaces in the password with an asterisk. • **Post Padding with #** — Select this option to fill the empty spaces in the password with a hash. • **Post Padding with space** — Select this option to fill the empty spaces in the password with space. • **No padding** — Select this option to avoid the use of padding characters in the password. This field is disabled in case you are creating a static password.
Start Value	Specify the starting index for the report field. The starting value starts from 1. This field is disabled in case you are creating a static password.
No. of Characters	Specify the length of the password. This field is disabled in case you are creating a static password.

The new password appears under the Added Content Details displaying the content and characters of the password. The number of password characters is automatically fetched by the system.

Creating a user password

You can create a master password in the User Password tab of the Password Properties dialog.

Property	Description
Description	Specify the password policy description. This description is only available at the time of password creation.
Source Name	Select a suitable type for the source from the dropdown. It indicates the type of password you want to create. • Select **Static Text** to specify a static value for the password. • Select **Report Field** to create user-specific passwords. These passwords vary depending on the users.
Content	• In case you selected Static Text as the source name. Then enter the static content for the password. • In case you selected Report Field as the source name. Then, select the required report field you want to use for creating the password. The Content dropdown only shows the fields added to the template or configured in the Template Properties dialog.
Function	Select the data type of the report field.
Padding Type	Select the padding type for the password. A padding character fills the empty spaces in the password with a space or special character like an asterisk or hash. • **Post Padding with *** — Select this option to fill the empty spaces in the password with an asterisk. • **Post Padding with #** — Select this option to fill the empty spaces in the password with a hash. • **Post Padding with space** — Select this option to fill the empty spaces in the password with space. • **No padding** — Select this option to avoid the use of padding characters in the password. This field is disabled in case you are creating a static password.

Property	Description
Start Value	Specify the starting index for the report field. The starting value starts from 1. This field is disabled in case you are creating a static password.
No. of Characters	Specify the length of the password. This field is disabled in case you are creating a static password.

The new password appears under the Added Content Details displaying the content and characters of the password. The number of password characters is automatically fetched by the system.

Changing content sequence

OmniOMS Communication Designer enables you to change the sequence of the password contents. This can be achieved by hovering over the required content and then using the Up and Down arrows, respectively.

Digital signature

With OmniOMS Communication Designer, you can insert a digital signature to ensure the integrity and authenticity of the document using the Personal Information Exchange (PFX) file or Hardware Security Module (HSM).

There can only be one digital signature for a PDF page.

To add a digital signature, go to the **Insert** tab. Select the **Digital Signature** control from the Controls toolbar and click anywhere in the design canvas to open the Digital Signature dialog. In the Digital Signature dialog that appears, select the required digital signature from the list.

The Digital Signature dialog displays a list of digital signatures that are uploaded to the Admin Workspace. Here, you can sort the signatures in ascending or descending order by clicking the up/down arrow next to the Digital Signature Name.

For more information on how to add a digital signature in Admin Console, refer to the *OmniOMS Admin Workspace User Guide*.

Furthermore, this topic explains how to configure the properties of the digital signature:

- Configuring digital signature properties

Configure digital signature properties

Configure the property of digital signature control to replace the existing signature added to the template with a new one. To do so, follow the below steps:

1. Right-click the Digital Signature control on the design canvas and then select **Properties** from the context menu.
   The Digital Signature dialog appears. By default, the already added signature is selected in the list.
2. Select the required digital signature from the list to replace the current one in the template. You can also click the up/down arrow next to the Digital Signature Name to sort the list in ascending or descending order.
3. Click **Save** to confirm.

Annexure configuration

Use the Annexure Configuration control to append the supplementary documents to your PDF attachments. You can append the supplementary documents at the beginning or end of the PDF attachment. Additionally, you can also define rules and associate them with the annexures based on your requirements.

To add an annexure, go to the **Insert** tab. Select the **Annexure Configuration** control from the Controls toolbar and click anywhere in the design canvas to open the Annexure Configuration dialog. This topic explains how to configure the settings for an annexure:

- Configuring annexure settings
- Changing annexure sequence

Configuring annexure settings

You can set the annexure properties in the Annexure Configuration dialog.

1. Under the Select Rule section, select the rule you want to associate with the annexure. By default, there is a rule that is true for all the cases.
   You can also click **+ New** to define a new rule. For more details, see Creating rule.
2. Under the Select Annexure Items, select the required annexure from the dropdown list.

   These annexures are added from the Admin Workspace. For more information, see **NewgenONE OmniOMS Admin Workspace User Guide**.
3. Click **Add**.
   The selected annexure now appears in the list.
4. Enable the **Append from Start** toggle to add the annexure at the beginning of the PDF.
5. Click **Apply**.
   The added annexure now appears under the Associated Annexure(s) section.

Changing annexure sequence

In case of multiple annexures, OmniOMS Communication Designer enables you to change the sequence of the added annexures. This can be achieved by hovering over the required content and then using the Up and Down arrows, respectively.

Related topic(s)

Creating rule

Watermark configuration

OmniOMS Communication Designer gives you the capability to apply watermarks to your letter template. Watermarks can be used to secure confidential information from being altered or stolen. You can specify the image and text to display as watermarks, and later associate them with rules.

> Watermarks are visible when you preview the template.

To add a watermark, go to the **Insert** tab and select the **Watermark Configuration** control from the Controls toolbar.

- Applying an image watermark
- Applying a text watermark

Applying an image watermark

To add an image watermark, follow the below steps:

1. On the Image tab, select any one of the following options for the image source:
    - **Browse File** — Click the **Browse** icon ••• to upload an image from your local system.
    - **Input URL** — Enter a valid image URL. The supported image formats are .jpeg, and .jpg.

    > - The image URL must be accessible to the application server.
    > - The image URL must end with a "." followed by its file extension.

2. Click **Add**.
   The added watermark appears under the Watermark Image List section, and you can see the preview appear in the middle section of the dialog.
   Additionally, you can associate rules with the watermark by clicking **Apply Rule**.
   For more information, see Defining and managing rules.

    > To insert the image multiple times in the template, click **Add** again. The same image gets added to the template.

3. To adjust the style and appearance of the watermark, specify the following properties in the right section of the dialog:

Property	Description
Top Offset	Specify the top margin area (in pixels) for the watermark.
Left Offset	Specify the left margin area (in pixels) for the watermark.
Width	Select the width of the watermark (in pixels) for the watermark.
Height	Specify the height of the watermark (in pixels) for the watermark.
Fill Opacity	Specify the fill opacity of the watermark using the slider. The opacity value must be in the range of 0 to 100 pixels.
Stroke Opacity	Specify the stroke opacity of the watermark using the slider. The opacity value must be in the range of 0 to 100 pixels.
Orientation	Set the orientation of the watermark in degrees.
Lock Aspect Ratio	Click the **Lock Aspect Ratio** icon to lock the aspect ratio of the watermark.

4. Click **Apply** to save.

Applying a text watermark

To add a text watermark, follow the below steps:

1. In the Watermark Configuration dialog, go to the **Text** tab.
2. Specify the text content to display as a watermark.
   You can also insert a macro field as a watermark by clicking the **Add Macro** icon. In the Dataset Field dialog that appears, select the required table and its column. Click **OK** to confirm.
3. Click **Add**.
   The added watermark appears under the Watermark Image List section, and you can see the preview appear in the middle section of the dialog. Additionally, you can associate rules with the watermark by clicking **Apply Rule**. For more information, see Defining and managing rules.

   To insert the text multiple times in the template, click **Add** again.
   The same text gets added to the template.

4. In the right section of the dialog, you can adjust the style and appearance of the watermark.

Property	Description
Position	
Top Offset	Specify the top margin area (in pixels) for the watermark.
Left Offset	Specify the left margin area (in pixels) for the watermark.
Text Properties	
Font Style	Select the font style of the watermark text content.
Font Size	Select the font size of the watermark text content.
Fore Color	Select the font color for the watermark text content using the color palette or enter the color name with RGB or hexadecimal values.
Back Color	Select the background color for the watermark text content using the color palette or enter the color name with RGB or hexadecimal values.
Appearance	
Width	Select the width of the watermark (in pixels) for the watermark.
Height	Specify the height of the watermark (in pixels) for the watermark.
Fill Opacity	Specify the fill opacity of the watermark using the slider. The opacity value must be in the range of 0 to 100 pixels.
Stroke Opacity	Specify the stroke opacity of the watermark using the slider. The opacity value must be in the range of 0 to 100 pixels.
Orientation	Set the orientation of the watermark in degrees.

5. Click **Apply** to save.

Related topic(s)

Defining and managing rules

Paragraph

User paragraph control in a letter template to display textual control in a structured way. To add a paragraph, go to the **Insert** tab. Select the **Paragraph** control from the Controls toolbar and click anywhere in the design canvas. The paragraph gets added. This topic provides details about the properties and various operations you can apply to a Paragraph control:

- Configuring paragraph controls
- Setting padding
- Adding a system field
- Adding a macro field
- Adding a hyperlink
- Creating a multilevel numbering
- Adding dynamic text

Configuring paragraph properties

To set properties for a paragraph, right-click the paragraph on the design canvas and then select **Properties** from the context menu to open the Paragraph Properties dialog.

Property	Description
Name	Specify the name of the paragraph. The default value is 'Clause: 1'.
Inherit Property	Select the base paragraph to inherit the properties.
Level	Select the numbering level to apply to the paragraph. For more information, see Creating a multilevel numbering.
Attribute	Select to enable the following attributes for the paragraph: • **Editable** — Select this checkbox to make the paragraph editable in the Interactive Editor. • **Removable** — Select this checkbox to grant access to delete the paragraph in the Interactive Editor. • **Skip Numbering** — Select this checkbox to skip the numbering for the paragraph.

Setting padding

To set padding for the Paragraph control, follow the below steps:

1. On the design canvas, right-click the Paragraph control.
2. Select **Set Padding** from the context menu.
   The Set Padding dialog appears.
3. Specify the top padding for the control's top border in pixels.
4. Specify the left padding for the control left border in pixels.
5. Click **Set** to save.

Adding a system field

There are eight system fields in OmniOMS Communication Designer that are statement date, current date and time, current date, current time, current time new, current page, total pages, and total pages in words.

To add system fields in a Paragraph control, follow the below steps:

1. On the design canvas, right-click the Paragraph control.
2. Select **Add System Fields** from the context menu. A list of supported system fields appears.
3. Select the required system fields from the list.

System field	Description
Statement Date	Indicates the template generation date.
Current Date Time	Returns the current system date and time in dd-MM-yyyy hh:mm:ss format.
Current Date	Returns the current system date in dd-MM-yy format.
Current Time	Returns the current system time in hh:mm:ss format.
Current Time New	Returns the current system time in hh:mm:ss a zzz format.
Current Page	Returns the current page of the letter template.
Total Pages	Return the total number of pages in the letter template.
Total Pages in words	Return the total number of pages in the letter template in words.

The system field gets added.

Adding a macro field

A macro field is a field in the linked dataset. You can add macro fields in the paragraph control to show dynamic content. For example, you can insert macro fields to display an employee's name, address, phone, designation, and other details in the email.

To add a macro field, follow the below steps:

1. On the design canvas, right-click the Paragraph control.
2. Select **Add Macro** option from the context menu.
   The Dataset Field dialog appears.
3. Select the table name from the dropdown list.
4. Select the column name from the dropdown list.
5. Click **OK**.

Adding a hyperlink

Insert hyperlinks to link the text with a web page.

To add a hyperlink, follow the below steps:

1. In the Paragraph control, select the required text.
2. Right-click the selected text and then select **Add Hyperlink** option from the context menu.
   The Add Hyperlink dialog appears.
3. Enter the name of the hyperlink. By default, the selected text appears in this field.
4. Then, specify the target link.
5. Click **Save** to confirm.

Creating a multilevel numbering

OmniOMS Communication Designer allows you to apply multilevel numbering on the Paragraph controls.

To define a multilevel list, follow the below steps:

- You can define listing levels up to four levels.
- These multilevel numberings created are shown at the cabinet levels.
- A default multilevel list is already applied to the Paragraph controls.

1. Go to the **Home** tab and click **More Options** •••.

2. Select **Number Sequence Library** from the list.
   The Number Sequencing dialog appears.
3. Click **+ New List** to define a new list.
4. Under the List Details section, specify the style of the list. It can be any of the following:
   - 1, 2, 3
   - A, B, C
   - a, b, c
   - I, II, III
   - i, ii, iii
5. Specify the indentation for the listing level (in inches).
6. Click **Add List**.
   The new list appears under the Multilevel List section.
   You can now select the required list from the dialog to apply to the Paragraph controls in the template. The chosen numbering gets applied on the basis of the top-to-bottom approach. To change the level of the numbering for a paragraph, set the **Level** property in the Properties dialog. For more information, see Configuring paragraph properties.

Adding dynamic text

OmniOMS Communication Designer allows you to create a section in an editable paragraph as non-editable that reflects in the Interactive Editor.

To add a dynamic text, perform the following steps:

1. On the design canvas, right-click the Paragraph control.
2. Select **Dynamic Text** from the context menu.

   > This option is only available if the Editable attribute for the Paragraph control is enabled in the Paragraph Properties. For more information, see Configuring paragraph properties

   The Dynamic Text dialog appears. Here, you can create multiple sections to make them non-editable in the Interactive Editor.
3. In the Sections portion, click **+ New Section**.
   Then enter the details of the new section in the New Sections portion.
4. Enter the name of the section.
5. Enter the starting character of the section you want to make non-editable.
6. Enter the ending character of the section you want to make non-editable.
7. Select the **Non-Editable** checkbox to make the section non-editable.

8. Click **Add Section**.
   The section gets added.

Related topic(s)

Defining and managing rules

Page break

Use the Page Break control in a letter template to end the current page and insert a new one. To add a page break, go to the **Insert** tab. Select the **Page Break** control from the Controls toolbar and click on the design area where you want to insert the page break. It shifts the content that comes below the page break to the top of the new page.

Component

A component is a reusable piece of content that you can use across multiple templates. This saves you both time and effort and ensures a consistent look over templates. For more information, see Working with components.

To add a component, go to the **Insert** tab. From the **Controls** toolbar, click the **Components** control. Then, click anywhere in the design canvas and capture the required region. A Select Components dialog appears. Here, you can select the type of component you want to create. It can either be a Local Component or an Enterprise Component. Then, click **Save** to confirm. The component gets created. It includes all the controls in the selected region.

For more information about the component types, see Types of components.

- Ensure that the selected region does not contain any other component or arithmetic expression.
- Controls must completely lie within the selected region.
- There can only be one digital signature in the template including the component.
- You cannot add a pre-existing component to the same letter page.

A component supports all the formatting options, controls, and alignment options you apply to a letter template. For more information, see Adding a letter template.

- **Formatting options** — The File menu consists of a formatting toolbar that provides various formatting options to modify the font size, color, alignment, and style.

  The formatting toolbar of the component does not support the following options as the letter template — Header and Footer, Increase/Decrease page, and Number Sequence Library.

- **Controls** — The Insert menu consists of a Controls toolbar that allows you to insert text, images, links, buttons, and other controls to the component.

  > The Controls toolbar of the component does not support the following options as the letter template — Password, Watermark configuration, Annexure configuration, and Add page break.

- **Alignment options** — The Align menu provides various options to align controls, set paragraph spacing, and reset the control size of the template.

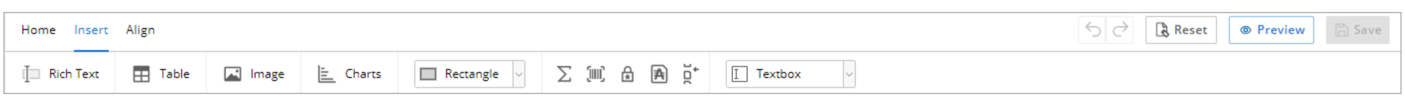
You can then click **Save** to confirm the changes.

Related topic(s)

- Working with components
- Working with component gallery

Fillable PDF template

The fillable template supports the following controls. You can simply drag and drop the control from the Controls toolbar to the section.



- Rich text
- Table
- Image
- Charts
- Shape
- Arithmetic expression
- Barcode
- Password
- Watermark configuration
- Annexure configuration
- Fillable form fields

When you add controls to the template, you can perform various operations on it. Although the list of operations for each control varies.

Table

Use the table control in your letter template to display data in tabular format. A table is composed of rows and columns. You can add or remove the rows and columns from the table. You can also adjust the column size. Apart from this, you can also display dynamic content, merge the table cells, add table headers, and others.

To add a table, go to the Insert tab. Select the **Table** control from the Controls toolbar and click anywhere in the design canvas to open the Table Properties dialog. This topic covers the following sections:

- Configuring table properties
- Setting table border
- Setting table dimension
- Setting a cell border
- Specify table padding
- Adjusting cell text rotation
- Merging table cells
- Adding a system field
- Adding a macro field
- Adding a hyperlink
- Adding table elements

Configuring table properties

You can configure the table settings in the Structure tab of the Table Properties dialog.

Property	Description
Table Name	Specify the name of the table. The table must have a unique name within a template.
Column Information	
Equalize Width	Enable the toggle to allow the auto-distribution of column width within the table. The sum of all the column widths must be 100 percent.
+New Column	By default, there are two columns in the table. You can add more columns by clicking the **+ New Column**. Additionally, you can modify the column width and apply rules to the columns. For more information, see Defining and managing rules.

Property	Description
Rows Information	
Insert After Selected Row	Choose this option to add a new row below the selected row in the Row Information section, and then click **+ Add New Row**. Additionally, you can apply rules to the added rows.
Insert Before Selected Row	Choose this option to add a new row before the selected row in the Row Information section, and then click **+ Add New Row**. Additionally, you can apply rules to the added rows.

Adding table elements

You can enhance your table by adding various elements such as text, images, barcodes, data fields, and interactive controls. Each element can be added by selecting the appropriate option from the dropdown menu in the table header bar.

Text

Add formatted text to your table cells for better presentation.

To add text to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **Text**.
3. Click the required cell. The Text Properties dialog appears with the following options:

Property	Description
Content	White space to write the text with the following options to edit the text: • **Font** — Select the font type. • **Font Size** — Select the font size. • **Bold** — Make the text bold. • **Italics** — Italicize the text. • **Underline** — Underline the text. • **Font Color** — Choose the font color. • **Background Color** — Choose the background color.
Text Rotation	Select the text rotation angle from the dropdown (0, 90, 180, 270).

Property	Description
Attributes	**Apply Indentation** — Checkbox to apply indentation. **Running Direction** — Checkbox to set text running direction from right to left.

4. Click **Save**.

Image

Add images to your table cells to visually represent data or enhance the appearance of your table.

To add an image to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select Image.
3. Click the required cell. The Image Properties dialog appears with options to configure the image settings:

Property	Description
Image Source	Add an image using any of the following options: • **Browse File** — Select this option to add an image from your local system. • **Input URL** — Select this option to add an image using a valid URL. The supported image formats are .jpeg, and .jpg. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension.
Preview	It displays the preview of the added image.

4. Click **Add**.

Barcode

Insert barcodes into your table cells to include scannable information.

To add a barcode to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **Barcode**.
3. Click the required cell. The Barcode Properties dialog appears with options to configure the barcode settings. To configure the Barcode, see Barcode

Data Field

Add data fields to your table cells to dynamically display data from your dataset.

To add a data field to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, and from the More Options dropdown, select **Data Field**.
3. Click the required cell. The Data Field Properties dialog appears with the following options:

Property	Description
Table	Select the dataset table from the dropdown menu.
Column	Select the dataset column from the dropdown menu.
Attributes	• **Running Direction** — Checkbox to set text running direction from right to left. • **Regional Language** — Checkbox to enable regional language support. • **Enable HTML Content** — Checkbox to enable HTML content

4. Click **Add**.

Interactive Controls

Insert interactive controls into your table cells, and utilize various interactive fields such as textboxes, checkboxes, date pickers, list boxes, and radio buttons. These controls allow you to gather specific input directly within the table, enhancing data collection and user interaction.

To add an interactive control to the table, follow these steps:

1. On the design canvas, place the cursor on the required table cell.
2. Go to the **Table** tab, then open the More Options dropdown.

3. Select **Interactive Controls** and choose the desired fillable form field from the available options.
4. Click the required cell. The selected fillable form field Properties dialog appears with options to configure. To configure the fillable form field, see Fillable form fields.

Related topic(s)

- Defining and managing rules
- Arithmetic expression

Fillable form fields

Form fields are interactive elements that allow you to input data within templates. These controls include textboxes, checkboxes, date pickers, list boxes, and radio buttons. They provide flexibility in capturing your information and enhancing the interactivity of the templates. You can also add form fields to table cells, further increasing the versatility of your templates.

Textbox

It allows the user to enter freeform text in the template.

To add a textbox, perform the following steps:

1. From the form field, choose Textbox and click the page. The Text Box Properties dialog appears with the following options:

Option	Description
Name	Enter a name for the textbox.
Type	Select this checkbox to allow only numerical input.
Enable Character Limit	Toggle this button to enable the character limit for the textbox.
Character Limit	Enter the maximum number of characters allowed in the textbox.
Border Width	Allows you to set the width of the textbox border.
Border Color	Choose the color of the textbox border from a color palette
Height	Allows you to set the height of the textbox.
Width	Allows you to set the width of the textbox.

2. Click **Save**. The text box appears on the page.

Modifying a textbox

To modify the textbox, right-click the textbox. The following options appear:

Option	Description
Cut	Allows you to remove the textbox from its current position and place it on the clipboard.
Copy	Allows you to copy the textbox to the clipboard.
Paste	Allows you to insert a previously cut or copied textbox from the clipboard to the current location.
Delete	Allows you to remove the textbox from the page.
Move To Front	Bring the textbox to the front, in front of other overlapping elements.
Add Macro field	Insert a macro field within the textbox for dynamic content.
Properties	Open the Text Box Properties dialog to edit the textbox settings.

Checkbox

It allows the user to select or deselect options in the template.

To add a checkbox, perform the following steps:

1. From the form field, choose Checkbox and click the page. The Checkbox Properties dialog appears with the following options:

Option	Description
Name	Enter a name for the checkbox.
Border Width	Allows you to set the width of the checkbox border.
Border Color	Choose the color of the checkbox border from a color palette
Height	Allows you to set the height of the checkbox.
Width	Allows you to set the width of the checkbox.
Checked By Default	Toggle this button to make the checkbox already checked.

2. Click **Save**. The checkbox appears on the page.

Modifying a checkbox

To modify the checkbox, right-click the checkbox. The following options appear:

Option	Description
Cut	Allows you to remove the checkbox from its current position and place it on the clipboard.
Copy	Allows you to copy the checkbox to the clipboard.
Paste	Allows you to insert a previously cut or copied checkbox from the clipboard to the current location.
Delete	Allows you to remove the checkbox from the page.
Move To Front	Bring the checkbox to the front, in front of other overlapping elements.
Properties	Open the Checkbox Properties dialog to edit the checkbox settings.

Date Picker

It allows the user to select a date from a calendar in the template.

To add a date picker, perform the following steps:

1. From the form field, choose Date Picker and click the page. The Date Picker Properties dialog appears with the following options:

Option	Description
Name	Enter a name for the date picker.
Day Format	Choose the format for the day.
Month Format	Choose the format for the month. Options include MM, Mon, Month.
Year Format	Choose the format for the year. Options include YYYY, YY.
Separator	Choose the separator character. Options include /, -, ,.
Day Position	Choose the position for the day. Options include 1, 2, 3.
Month Position	Choose the position for the month. Options include 1, 2, 3.
Year Position	Choose the position for the year. Options include 1, 2, 3.
Border Width	Allows you to set the width of the date picker border.

Option	Description
Color	Choose the color of the date picker border from a color palette.
Height	Allows you to set the height of the date picker.
Width	Allows you to set the width of the date picker.

2. Click **Save**. The date picker appears on the page.

Modifying a date picker

To modify the date picker, right-click the date picker. The following options appear:

Option	Description
Cut	Allows you to remove the date picker from its current position and place it on the clipboard.
Copy	Allows you to copy the date picker to the clipboard.
Paste	Allows you to insert a previously cut or copied date picker from the clipboard to the current location.
Delete	Allows you to remove the date picker from the page.
Move To Front	Bring the date picker to the front, in front of other overlapping elements.
Properties	Open the Date Picker Properties dialog to edit the date picker settings.

List Box

It allows the user to select one or more options from a list in the template.

To add a list box, perform the following steps:

1. From the form field, choose List Box and click the page. The List Box Properties dialog appears with the following options:

Option	Description
Name	Enter a name for the list box.
Default Item	Select the chosen values or macro from the list
Border Width	Allows you to set the width of the list box border.
Border Color	Choose the color of the list box border from a color palette
Height	Allows you to set the height of the list box.

Option	Description
Width	Allows you to set the width of the list box.
+ Add Macro	Add a macro to the list box
+ Add Value	Add a value to the list box.

2. Click **Save**. The list box appears on the page.

Modifying a list box

To modify the list box, right-click the list box. The following options appear:

Option	Description
Cut	Allows you to remove the list box from its current position and place it on the clipboard.
Copy	Allows you to copy the list box to the clipboard.
Paste	Allows you to insert a previously cut or copied list box from the clipboard to the current location.
Delete	Allows you to remove the list box from the page.
Move To Front	Bring the list box to the front, in front of other overlapping elements.
Properties	Open the List Box Properties dialog to edit the checkbox settings.

Radio Button

It allows the user to select one option from a group of choices in the template.

To add a radio button, perform the following steps:

1. From the form field, choose Radio and click the page. The Radio Properties dialog appears with the following options:

Option	Description
Name	Enter a name for the radio.
Border Width	Allows you to set the width of the radio button border.
Border Color	Choose the color of the radio button border from a color palette

Option	Description
Height	Allows you to set the height of the radio button.
Width	Allows you to set the width of the radio button.
Checked By Default	Toggle this button to make the radio button already checked.

2. Click **Save**. The radio button appears on the page.

Modifying a radio button

To modify the radio button, right-click the radio button. The following options appear:

Option	Description
Cut	Allows you to remove the radio button from its current position and place it on the clipboard.
Copy	Allows you to copy the radio button to the clipboard.
Paste	Allows you to insert a previously cut or copied radio button from the clipboard to the current location.
Delete	Allows you to remove the radio button from the page.
Move To Front	Bring the radio button to the front, in front of other overlapping elements.
Radio Grouping	Allows you to group with another radio button so that only one can be chosen at a time (for example: gender selection). For more information, see Radio Grouping.
Properties	Open the Radio Properties dialog to edit the checkbox settings.

Grouping radio button

To group radio button, perform the following steps:

1. Right-click the radio button and select **Radio Grouping**. The Radio Grouping dialog appears with the following options:

Option	Description
Type	Select whether to create a new group or add to an existing group of radio buttons.

Option	Description
Group Name	If New Group is selected, enter a name for the new group. If Existing Group is selected, choose from a dropdown list of available group names.

2. Click the **Save** button to group the radio buttons.

Design on PDF template

The Design on PDF template helps you to add content on top of the existing PDF design. It provides support for the following controls.

- Rich Text
- Image
- Password

The above controls have the same functionality as the controls in the letter template. After adding the controls to the template, you can configure their corresponding properties and apply operations to them.

Defining and managing rules

Use rules to make logical comparisons between the actual and expected value, and determine the necessary action if the condition is true. By defining rules, you can generate conditional content in your templates. For example, a company can generate varied promotional offers in the template based on the privileged customer category, that is, gold, silver, or platinum.

In OmniOMS Communication Designer, rules can be applied to specific controls within letter and PDF templates, as well as to sections in email templates.
For letter and PDF templates, rules can be applied to:

- Rich Text
- Table
- Image
- Shapes including rectangles, lines, and circles
- Arithmetic Expression
- Paragraph
- Watermark configuration
- Component

For email templates, rules can be applied only to sections, allowing for dynamic content that responds to the conditions set for each section as a whole, rather than individual elements.

Creating a rule

The Rule library is a collection of rules you created for your template. It lists all the rules created for all the supported controls.

To create a new rule, follow the below steps:

1. Open the Rule Library.
    - In the case of letter template, go to the **Home** tab. Click **More Options** •••, and then select **Rule Library** from the formatting toolbar.
    - In the case of design on PDF template, go to the **Home** tab, and select **Rule Library** from the formatting toolbar. The Rule Library dialog appears.
    - In the case of Email template, go to the **Home** tab, and select **Rule Library** from the formatting toolbar. The Rule Library dialog appears.
2. Click **+ New Rule**. The Create Rule dialog appears.
3. Enter the following details in the dialog:

Property	Description
Name	Specify the name of the rule.
Active	Enable this checkbox to use this rule for template generation.
Data Field	Select the required dataset field from the dropdown list. It indicates the field on which you want to apply the rule.
Operator	Select the conditional operator you want to use for the rule. It can be any of the following: • Contains • Equals • Not Equal • Is Null • Is Not • Null Like • Not Like
Value Type	Specify whether you want to compare the selected dataset field with a static or dynamic value.
Value	Specify the expected value for the selected dataset field. If you chose static, then enter the static content in the space provided. If you chose static, then select the required dataset field from the dropdown list.
Operator	Select the required operator type for the rule. It can be AND or OR.

4. Click **Add**, and then click **Create**.
   The rule gets added to the Rule Library.

Associating rules with controls

In OmniOMS Communication Designer, you can apply rules to various controls within your templates, allowing you to generate dynamic content based on logical comparisons. Rules can be associated with several controls in letter, PDF, and email templates, ensuring that your templates react to specific conditions.

Associating rules with Email template sections

In email templates, rules can be applied only at the section level, not on individual elements. To associate a rule with a section in an email template, follow the below steps:

1. On the design canvas, click the desired section.
2. Select **Rules Association** from the context menu. The Rules Association dialog appears, listing all associated rules on the left side.
3. *(Optional)* Click **View details in the rule library** to see the defined rule.
4. Enter the required details in the dialog:

Property	Description
Rule Name	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Enable the toggle to display the control if the conditional logic is met.

5. Click **Associate**.
   The rule is now associated with the selected section. By default, an Else condition for the rule is also added to the associated rules.

Associating rules with other controls

Rules can also be applied to various other controls in your templates, such as:

- Rich Text
- Table
- Image
- Shapes (Rectangles, Lines, Circles)
- Arithmetic Expression

- Paragraph
- Watermark Configuration
- Component

Associating rule with rich text control

To associate a rule with the rich text control, follow the below steps:

1. On the design canvas, right-click the **Rich Text** control.
2. Select **Rules** from the context menu. The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.
3. *(Optional)* Click **View details in the rule library** to see the defined rule in the Rule Library.
4. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Turn on the toggle to display the control if the conditional logic is met.

5. Click **Associate**.
   The rule is now associated with the Rich Text control. By default, an Else condition for the rule is also added to the Associated Rules.

Associating rule with table control

To associate a rule with the table control, follow the below steps:

You can apply a rule to an entire table or a specific table cell, row, or column.

1. On the design canvas,
   - **To apply a rule on a specific cell** — Place the cursor on the required cell, press the Shift key and the left-mouse click. Then, select **Rules** from the context menu.
   - **To apply a rule on the entire table** — Right-click anywhere in the table and then select **Rules** from the context menu.

- **To apply a rule on a row or column** — Right-click anywhere in the table, and select Properties from the context menu. In the Structure tab of the Table Properties dialog, click the **Rules** icon next to the required row or column.

The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.

2. *(Optional)* Click **View details in rule library** to see the defined rule in the Rule Library.
3. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Enable the toggle to display the control if the conditional logic is met.

4. Click **Associate**.
The rule is now associated with Table control. By default, an Else condition for the rule is also added to the Associated Rules.

Associating rule with image control

To associate a rule with the image control, follow the below steps:

1. On the design canvas, right-click the Image control.
2. Select **Rules** from the context menu.
The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.
3. *(Optional)* Click **View details in rule library** to see the defined rule in the Rule Library.
4. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.

Property	Description
Show Object	Enable the toggle to display the specified image if the conditional logic is met.
Preview	Click **Browse** icon ••• to select the image from your local system. The image in the template gets replaced by the selected image if the conditional logic is met.

5. Click **Associate**.
   The rule is now associated with Image control.

Associating rule with shape control

To associate a rule with the shape control, follow the below steps:

1. On the design canvas, right-click the required Shape control.
2. Select **Rules** from the context menu.
   The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.
3. *(Optional)* Click **View details in rule library** to see the defined rule in the Rule Library.
4. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Enable the toggle to display the specified image if the conditional logic is met.
Preview	Apply conditional formatting on the shape: • In the case of a rectangle or circle, you can specify its border color, fill color, and line width. • In the case of a line, you can specify its border color and line width. You can also view the formatted shape in the preview area.

5. Click **Associate**.
   The rule is now associated with Shape control.

Associating rule with arithmetic expression control

To associate a rule with the arithmetic expression control, follow the below steps:

1. On the design canvas, right-click the required Arithmetic Expression control.
2. Select **Rules** from the context menu.
   The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.
3. *(Optional)* Click **View details in rule library** to see the defined rule in the Rule Library.
4. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Enable the toggle to display the specified content if the conditional logic is met.
Preview	Specify the content you want to display if the conditional logic is met. You can also apply text formatting to the content.

5. Click **Associate**.
   The rule is now associated with Arithmetic Expression control. By default, an Else condition for the rule is also added to the Associated Rules.

Associating rule with paragraph control

To associate a rule with the paragraph control, follow the below steps:

1. On the design canvas, right-click the required Paragraph control.
2. Select **Rules** from the context menu.
   The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.
3. *(Optional)* Click **View details in rule library** to see the defined rule in the Rule Library.
4. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Enable the toggle to display the control if the conditional logic is met.

5. Click **Associate**.
   The rule is now associated with Paragraph control. By default, an Else condition for the rule is also added to the Associated Rules.

Associating rule with watermark configuration control

To associate a rule with the watermark configuration control, follow the below steps:

1. From the Controls toolbar, select Watermark Configuration.
   Here, you can see the added image or text watermarks.
2. Go to the **Image** tab in case you inserted an image watermark. Else, go to the **Text** tab.
3. Click **Apply Rule**.
4. The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.
5. *(Optional)* Click **View details in the rule library** to see the defined rule in the Rule Library.
6. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Enable the toggle to display the control if the conditional logic is met.

Property	Description
Preview	• In the case of an image watermark, click **Browse** icon ••• to select the image from your local system. The image in the template gets replaced by the selected image if the conditional logic is met. • In the case of a text watermark, specify the content you want to display if the conditional logic is met. • You can also apply text formatting to the content.

7. Click **Associate**.
   The rule is now associated with the Watermark Configuration control.

Associating rule with component control

To associate a rule with the component control, follow the below steps:

1. On the design canvas, right-click the Component control.
2. Select **Rules** from the context menu.
   The Rules Association dialog appears. It lists all the associated rules on the left side of the dialog.
3. *(Optional)* Click **View details in the rule library** to see the defined rule in the Rule Library.
4. Enter the following details in the dialog:

Property	Description
Rule	Select the required rule from the dropdown list. You can also click the add icon to create a new rule. For procedural details, see Creating rule.
Condition	It denotes the conditional logic defined for the selected rule. It is prefilled with default values and cannot be modified.
Show Object	Enable the toggle to display the control if the conditional logic is met.

5. Click **Associate**.
   The rule is now associated with the Component control. By default, an Else condition for the rule is also added to the Associated Rules.

Managing rules

You can view all the created rules in the Rule Library dialog. It also displays the basic details of the rule and its associated controls. Apart from this, you can also edit the rule.

- Modifying rule
- Viewing associated controls

Modifying rule

To modify a rule, follow the below steps:

1. In the Rule Library dialog, select the required rule.
   The basic detail of the selected rule appears on the right of the dialog.
2. Click the edit icon next to the rule.
   The Modify Rule dialog appears.
3. Select the required conditional logic in the list
   - Click **Update** to edit the conditional logic.
   - Click **Clear** to discard the content of the conditional logic.
   - Click **Delete** to remove the conditional logic.
4. Click **Save**.

Viewing associated controls

To view associated control, follow the below steps:

1. In the Rule Library dialog, select the required page number from the dropdown list. It then shows the associated controls added to the selected page number in the template.
2. Select the type of control. It can be rich text, image, table, circle, line, or rectangle. Based on the entered details, the controls are displayed in the list.
3. You can enable or disable the **Show Object** toggle to modify the rule properties.
4. Click **Save** to apply the changes.

Deleting rule

To delete a rule, follow the below steps:

1. In the Rule Library dialog, select the required rule.
   The basic detail of the selected rule appears on the right of the dialog.

2. Click the delete icon next to the rule.
   The Delete Alert dialog appears.
3. Click **Delete** to delete the rule.

Adding an asset

OmniOMS Communication Designer supports two types of assets that you can add to your templates. They help in enhancing the layout and design of your template. Master layout templates and components are the different assets you can use while designing a template.

To add an asset, navigate to the **Assets** tab on the Communication Designer home page. Here, you can add an enterprise master layout template or component based on your business requirements. The assets added using the Assets tab are available at the global level. It means you can use these assets in any template available in your currently signed-in cabinet.

For more information, see the following sections:

- Working with master layouts
- Working with components

Working with master layouts

Master layout in a Communication Designer acts as a parent template for different pages in a letter. You can apply a master layout to specific letter pages or the entire letter template for consistent layout and design. For example, you can create a master layout for a bank statement with the company logo in the header and address in the footer and then apply it to the required pages in the letter template.

This way, there is no need to design the header or footer each time you work on a different letter page but focus on the content to add. Additionally, whenever you modify a master layout, you can select whether to implement the changes to a specific template or enforce updates to all the associated templates linked with the updated master layout at once.

In Communication Designer, you can add a master layout either at the local or enterprise (or global) level. For more details, see Understanding master layout types. Within a master layout, you can add multiple controls and further design them according to your business needs. The controls supported in a master layout are similar to those in a letter template.

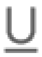
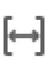
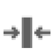
The menu bar of the letter template contains the following menu options:

- File menu
- Insert menu
- Align menu

File menu

The File menu consists of a formatting toolbar that provides various formatting options to modify the font size, color, alignment, and style.

The below table describes the different formatting options available in the formatting toolbar.

Icon	Icon Name	Description
	Font style	Change the font style of the selected text.
	Font Size	Change the font size of the selected text.
	Bold	Bold the selected text.
	Italics	Make the selected text italics.
	Underline	Underline the selected text.
	Strikethrough	Strikethrough the selected text.
	Fore Color	Change the font color of the selected text using the color palette and color names with RGB or hexadecimal values.
	Back Color	Change the background color of the selected text using the color palette and color names with RGB or hexadecimal values.
	Fill Color	Fill tables, rectangles, and circles with colors using the color palette and color names with RGB or hexadecimal values.
	Align	Align the selected text to left, right, justify, or center.
	Align vertically	Align the selected text at the top, middle, or bottom of the table cell.
	Superscript/ Subscript	Align the selected text above or below the normal line.
	Design background grid	Click to display gridlines on the design canvas.
	Fit to canvas width	Reset the control dimensions to fit the design canvas width. This option is only applicable to tables, rectangles, text, and images.
	Auto Relativity	Use this option to maintain spacing between the controls in the template. • The auto relativity feature does not impact the controls if you resize a table control. • The auto relativity does not have any impact on the line control.

Icon	Icon Name	Description
	Header and footer	Allow you to insert header and footer sections into the template. You can add text and images to the header and footer sections. You can also increase or reduce the size of these sections as per your requirements. The header and footer sections are applicable to all the pages in the letter template.
•••	More options	Select **Rule Library** option to create and add rules. For more information, see Defining and managing rules.

Insert menu

The Insert menu provides a Controls toolbar that allows you to insert text, images, links, buttons, components, and others into the template.

The below table describes the different controls available in the toolbar.

Icon	Icon Name	Description
	Rich Text	It allows to insert text in the template.
	Table	It allows to insert tables in the template.
	Image	It allows to insert images in the template.
Rectangle	Shape	It allows to insert shapes in the template such as rectangles, lines, and circles.
∑	Arithmetic Expression	It enables you to add arithmetic expressions in the template.
	Barcode	It allows to add 1-D and 2-D barcodes to the template.

Align menu

The Align menu provides various options to align controls, set paragraph spacing, and reset the control size within a template.

These alignment options are only applicable to rich text, images, rectangles, lines, and paragraphs.

Option	Description
Align Vertical Start	Aligns the controls vertically to the top edge of the last selected control.
Align Vertical Center	Aligns the controls vertically to the center of the last selected control.
Align Vertical End	Aligns the controls vertically to the bottom edge of the last selected control.
Align Horizontal Start	Aligns the controls horizontally to the left edge of the last selected control.
Align Horizontal Center	Aligns the controls horizontally to the center of the last selected control.
Align Horizontal End	Aligns the controls horizontally to the right edge of the last selected control.
Equal Height	Resets the height of the controls as that of the last selected control.
Equal Width	Resets the width of the controls as that of the last selected control.
Same Size	Resets the size of the controls as that of the last selected control.
Para spacing	Sets the spacing between the Paragraph controls (in pixels). The spacing value ranges from 4 to 50 pixels.
Merge	Merges the text within the selected Rich Text controls. Ensure the selected Rich Text controls are either aligned vertically or horizontally on the same line. By default, the text is appended in the same line. However, in case, the left edges of the rich text controls are in the same line, then you get an option to merge the text as a paragraph. This means the text of merged controls starts from a new paragraph.

Related topic(s)

- Understanding master layout types
- Linking a master layout
- Viewing associated templates
- Importing a master layout
- Managing master layouts
- Working with master layout gallery

Understanding master layout types

Communication Designer supports two types of master layouts – local and enterprise (or global).

- A **local master layout** is accessible only within the communication group where the master layout is created. You can link the master layout to the required template within that communication group. However, this layout is unavailable to the templates of other communication groups.
  In this type of master layout, you can use the data fields defined in the linked dataset. For example, the branch name field can be used to display the bank's branch name in the header. To add a local master layout, select **Master Layout** under the required communication group from the Categories pane, and then click **Add New** +.

  > Local master layouts are only applicable to common dataset communication groups. For more information, see Adding a communication group.

- An **enterprise master layout** is accessible globally by all the communication groups. You can link the master layout to any template irrespective of its communication group. An enterprise master layout is also referred to as a global master layout.
  This type of master template mostly contains static text or images such as disclaimers, company logos, and others. In the global master template, there is no scope to add the data fields. To add an enterprise master layout, on the **Assets** tab, expand the **Enterprise Master Layout** section and then click **Add New** +.

Related topic(s)

- Linking a master layout
- Viewing associated templates
- Importing a master layout
- Managing master layouts
- Working with master layout gallery

Linking a master layout

With Communication Designer, you can apply the master layout at the template level or page level. By template level, it means the master layout gets applied to all the pages in the letter template. However, if you want to apply the master layout to specific pages in the letter template, you link it at the page level.

To link a master layout to a template or page, follow the below steps:

1. From the Categories pane, select the required letter template or letter page.
2. From the right, click **Master Layout Gallery**.
   The Master Layout Gallery pane appears.
3. Select the required master layout from the list.
   You can also use the search box to find the layout by its name. Additionally, you can filter the templates using the Filter icon to view only the local, enterprise, or both types of master layouts.
4. Click **Link** to apply the master layout.
   The master layout gets applied to the background of the template. The background appears in gray and is uneditable.

Related topic(s)

- Viewing associated templates
- Importing a master layout
- Managing master layouts
- Working with master layout gallery

Viewing associated templates

When you apply a master template to a letter template or its pages, the template gets linked to the layout.

To view the associated templates, follow the below steps:

1. On the Categories pane, select the required master layout from the list.
2. Click **More Options** and then select **Associated Templates**.
   The View Associated Templates dialog appears. Here, you can view all the associated templates where the master layout is applied with the layout version,

its category, and the communication group it belongs to. Apart from this, you can view the template name, status, and the applied master layout version.

> If the master layout is not associated with any letter template or pages, the list of associated templates appears blank.

3. (Optional) To view only the templates where a master layout of a specific version is applied, click **Filters** and then select the required layout version.
   The list gets filtered based on the chosen value from the dropdown.
4. (Optional) Furthermore, you can perform the following operations on the associated templates list:
   - **Go to template** — Select the required checkbox next to the template and then click **Go to template** to view the associated template.
   - **Enforce** — Select the required checkbox next to the template and then click the **Enforce** button or enforce icon to apply the latest layout version on the letter template and its pages. You can also enforce the latest version of the layout on multiple templates using the **Enforce** button.

     > You can enforce the master layout only on the checked-in templates.
5. Click **Close**.

Related topic(s)

Working with master layout gallery

Importing a master layout

You can import a master layout to use it as a template. You can then modify the template design based on your requirements. These template changes do not affect the original master layout.

To import a master template, perform the following steps:

1. From the Categories pane, select the required letter page.
2. On the right, click **Master Layout Gallery**.
   The Master Layout Gallery pane appears.
3. From the gallery, select the required layout and then click the **Import** icon.
   The master layout gets imported.

You can now modify and make changes to the layout without hampering the original master layout design.

Related topic(s)

Working with master layout gallery

Managing master layouts

This topic explains how to manage master templates in Communication Designer. Select the required local or enterprise master layout from the Categories pane or Assets tab, respectively, and then perform any of the following operations:

- Checking in
- Checking out
- Copying

> You can only copy a local master layout to a different location.

- Renaming
- Deleting

The steps for the above operations are the same as the communication templates. For procedural details, see Managing templates and jobs.

Apart from this, you can perform the following operation on the master layout:

- Modifying page properties
- Viewing version history

Modifying page properties

Communication Designer allows you to change the default settings of the master layout page. These settings include the page layout, orientation, and margin properties.

To modify page properties, follow the below steps:

1. From the Categories pane, select the required master layout.

2. Click **More Options** ••• and then select **Page Properties** from the list.
   The Page Properties dialog appears.
3. Set the following page properties in the dialog:

Property	Description
Orientation	Specify the page orientation type. It can be set to Landscape or Portrait.
Page Layout	Specify the layout of the page. It can be set to Letter, Legal, Tabloid, A3, A4, A5, and B5. You can also specify custom height and width for the page in inches.
Page Width	It indicates the width of the page in inches. This property is disabled by default and shows value based on the chosen page layout.
Page Height	It indicates the height of the page in inches. This property is disabled by default and shows value based on the chosen page layout.
Header Margin	Specify the margin area (in inches) for the header section on the page.
Footer Margin	Specify the margin area (in inches) for the footer section on the page.
Left Margin	Specify the margin area (in inches) for the left side of the page.
Right Margin	Specify the margin area (in inches) for the right side of the page.

4. Click **Save** to confirm the changes.

Viewing version history

Communication Designer allows you to view the history of changes for the selected master layout. This is achieved by clicking the **More Options** ••• next to the required layout and selecting the **Version History** option from the list.

A Version History pane appears on the right. Here, you can see a list of versions for the selected master layout. Furthermore, it only lists the checked-in changes. This is because a new version gets created each time you check in a master layout.

When you hover over the corresponding info icon ⓘ for any layout version, it provides the name of the user who checked in the template, the checked-in time details, and the comment. Additionally, hovering over the version gives you the option to checkout. Select this option to check out the layout version to make modifications.

In the Version History pane, you can find a particular layout version in the search box. To arrange the versions in ascending or descending order, click the up/down arrow toggle next to the column header.

Working with components

A component is a subpart of a template. It provides a reusable piece of content that you can use across multiple letter and email templates. Whenever you modify a component, you can select whether to implement the changes to a specific template or enforce updates to all the associated templates containing the updated component at once.
By using components, template designers can create a consistent and streamlined approach for template creation. It simplifies the maintenance process and reduces the time and effort required to manage multiple templates in your currently signed-in cabinet.

Communication Designer consists of local and enterprise (or global) components. For more information about the types of components, see Types of components. You can use components only in letter and email templates.

Types of components

- A **local component** is accessible only within the communication group where the component is created. You can add the component to the required template within that communication group. However, this component is unavailable to the templates of other communication groups. In this type of component, you can use the data fields defined in the linked dataset.
  To add a local component, select **Component** under the required communication group from the Categories pane, and then click **Add New** ➕.
  Alternatively, you can use the Component control in the template by simply dragging and dropping it into the design canvas. For more information, see Adding controls.

  > Local components are only applicable to common dataset communication groups. For more information, see Adding a communication group.

- An **enterprise component** is accessible globally by all the communication groups. You can add the component to any template irrespective of its communication group. An enterprise component is also referred to as a global component.

This component mostly contains static text or images such as disclaimers, company logos, and others. In the global component, there is no scope to add the data fields. To add an enterprise component, on the **Assets** tab, expand the Enterprise Component section and then click **Add New** ＋.

You cannot add a pre-existing component to the same letter page or email template.

Related topic(s)

- Linking a component
- Viewing associated components
- Managing components
- Viewing version history
- Working with component gallery

Linking a component

Communication Designer allows you to add components to an email or letter template.

To add a component to a template, follow the below steps:

1. From the Categories pane, select the required email or letter template.
2. From the right, select **Component Gallery**.
   The Component Gallery pane appears.
3. Drag and drop the required component from the list. This list contains all the local and enterprise components created in the currently signed-in cabinet.
   You can also use the search box to find the component by its name. Additionally, you can filter the components using the Filter icon to view only the local, enterprise, or both types of components.
   The component is now added to the design canvas.

   The email template allows you to use the added component as a section of the template. This can be achieved by selecting the required component in the template and using the **Unlink Component** option from the list.

Related topic(s)

- Viewing associated components
- Managing components

- Viewing version history
- Working with component gallery

Viewing associated components

When you insert a component into an email or a letter template, the component gets linked to the template.

To view the associated templates, follow the below steps:

1. On the Categories pane, select the required component from the list.
2. Click **More Options** ••• and then select **Associated Templates**.
   The View Associated Templates dialog appears. Here, you can view all the associated templates where the component is added with its version, category, and the communication group it belongs to. Apart from this, you can view the component name, status, and the added component version.

   > If the component is not added to any template, the list of associated templates appears blank.

3. (Optional) To view only the templates where a component of a specific version is applied, click **Filters** and then select the required component version.
   The list gets filtered based on the chosen value from the dropdown.
4. (Optional) Furthermore, you can perform the following operations on the associated templates:
   - **Go to template** — Select the required checkbox next to the template and then click **Go to template** to view the associated template.
   - **Enforce** — Select the required checkbox next to the template and then click the **Enforce** button or enforce icon to apply the latest component version on the template. You can also enforce the latest version of the component on multiple templates using the **Enforce** button.

     > You can enforce the component only on the checked-in templates.

5. Click **Close**.

Related topic(s)

- Managing components
- Working with component gallery

Managing components

This topic explains how to manage components in Communication Designer. Select the required local or enterprise component from the Categories pane or Assets tab, respectively, and then perform any of the following operations:

- Checking in
- Baselining

> You can baseline only checked-in components.

- Checking out
- Copying

> You can only copy a local component to a different location.

- Renaming
- Deleting

The steps for the above operations are the same as the communication templates. For procedural details, see Managing templates and jobs.

Apart from this, you can view the version history of the component. For more information, see Viewing version history.

Related topic(s)

- Viewing version history
- Working with component gallery

Viewing version history

Communication Designer allows you to view the history of changes for the selected component. This is achieved by clicking the **More Options** ••• next to the required component and selecting the **Version History** option from the list.

A Version History pane appears on the right. Here, you can see a list of versions for the selected component. Furthermore, it only lists the checked-in changes. This is because a new version gets created each time you check in a component.

When you hover over the corresponding info icon ⓘ for any component version, it provides the username of who checked in the template, the checked-in time details, and the comment. Additionally, hovering over the version gives you the option to checkout. Select this option to check out the component version to make modifications.

In the Version History pane, you can find a particular component version in the search box. To arrange the versions in ascending or descending order, click the up/down arrow toggle next to the column header.

Related topic(s)

Working with component gallery

Working with jobs

A job is a set of configuration settings that instruct the production server for generation purposes. These are the settings that specify recipients for emails, SMS, WhatsApp, X, and Facebook messages where to archive communications, and details for the email body and attachments.

You can create the following on-demand jobs:

- Creating on demand social job
- Creating on demand mail/archival job

Creating an on-demand social job

The on-demand social job allows you to configure the settings for message, WhatsApp, X, and Facebook communications.

To create an on-demand social job, follow the below steps:

Ensure to design the message, WhatsApp, X, or Facebook template before configuring the job, or else an error appears.

1. On the Categories pane, select **Jobs** under the required communication group.
2. Click the **New Job** icon next to Jobs.
3. Select **On Demand Social** from the list.
   The New On Demand Social Job dialog appears.
4. Enter the name of the job.
5. Add a description of the job.
6. Select a suitable template from the dropdown list.

   Only the baselined message, WhatsApp, X, and Facebook templates appear in the list.

7. *(Optional)* To add multiple templates, click **Associate Template**.
   The Associate Templates dialog appears. Select the required template from the list and click **Associate**. You can also click **Select All** to select all the templates in the

list.
The template gets associated.
8. Navigate to the required tab and configure the properties. For more information, see Configuring properties.
9. Click **Add** to confirm.

Configuring properties

The on-demand social job provides the following configuration settings.

The **Message** tab describes the configuration settings for message communication.

1. Select the **Message Required** checkbox to specify the configuration settings for message communication.
2. Select a suitable dataset field from the dropdown list. This field must contain message recipient numbers.
3. Select the configuration type for interacting with web services. It can be Web Services Description Language (WSDL) or Representational State Transfer (REST) Service.
4. Click **Go**.
5. If you chose WSDL, then enter the following details:
   a. Specify an appropriate WSDL URL.
   b. Click **Go**.
   c. Select an appropriate service name from the list.
   d. Select an appropriate method name from the list.
   e. Click **Register**.
   f. Enter the field names manually.
6. In case you select REST Service, then specify the following details:
   a. Specify an appropriate REST URL.
   b. Click **Next**.
   c. Select a suitable media type from the dropdown list.
   d. Then, map the field with the dataset fields.
   e. Click **Add** to confirm.
   The added mapped fields appear in the list.

The **Archival** tab describes the configuration settings for archiving conversations.

1. Select the **Message Archived** option to archive the conversations.
2. Select a suitable Document Management System (DMS) from the dropdown list. Currently, OmniOMS Communication Designer supports NewgenONE OmniDocs.

3. Select the **Is Secured** checkbox to secure the information using HTTPS.
4. Select the attributes based on your requirements:
    - **Attachment** — Select this checkbox to archive the attachment in DMS.

      For message communication, do not select the Attachment checkbox.

    - **Communication** — Select this checkbox to archive the communication in DMS.
5. Specify the DMS server address.
6. Specify the DMS server port.
7. Specify the DMS server type. It can be JBoss, JBossEAP, Weblogic, and Websphere.
8. Enter the login ID for the DMS cabinet.
9. Enter the password for the DMS cabinet.
10. Select a suitable cabinet from the dropdown list.
11. Specify the suitable volume, folder, and data class from the corresponding dropdown lists.
12. Click **Add**.
    The selected folder gets added.
13. Click **Get Fields**.
    The fields associated with the selected folder appear in the Map Fields section.
14. Map the required fields with the dataset fields to store the text of the **Message Template**.
    A message box appears.
15. Click **Yes** to save the changes.

The **WhatsApp** tab describes the configuration settings for WhatsApp communication.

1. Select the **Whatsapp Required** checkbox to specify the configuration settings for WhatsApp communication.
2. Select a suitable dataset field from the dropdown list. This field must contain WhatsApp recipient numbers.

The **X** tab describes the configuration settings for X communication.

1. Select the **X Required** checkbox to specify the configuration settings for X communication.
2. Select the **Job Type** as DM or Post based on the requirement.
3. Select a suitable dataset field from the dropdown list. This field must contain X recipient numbers.

The **Facebook** tab describes the configuration settings for Facebook communication.

1. Select the **Facebook Required** checkbox to specify the configuration settings for Facebook communication.
2. Select the **Job Type** as DM or Post based on the requirement.
3. Select a suitable dataset field from the dropdown list. This field must contain Facebook recipient numbers.

The **Settings** tab describes the configuration settings for archiving conversations on the cloud. OmniOMS integration with Amazon S3 and MS Azure sites facilitates temporary storage of the generated communications in the respective sites. Storing the generated communications in a cloud environment helps OmniOMS with high availability.

1. Select the **Cloud Storage** checkbox to specify the configuration settings for cloud storage.
2. Select a suitable type of storage type from the dropdown list. You can either use Amazon S3 Site or MS Azure Site.
3. Select a suitable site name from the dropdown list.

   > These site names are created in the OmniOMS Workspace. For more information, see **NewgenONE OmniOMS Admin Workspace User Guide**.

4. If you chose the Amazon S3 Site as the storage type, click the **Get Containers** button and then select a suitable cabinet from the dropdown list.
   If you chose MS Azure Site as the storage type, click the **Get Buckets** button and then select a suitable cabinet from the dropdown list.
5. Click **Add**.

Creating an on-demand mail/archival job

The on-demand mail/archival job allows you to configure the settings for mail communications, or archival purposes.

To create an on-demand mail/archival job, follow the below steps:

> Ensure to design the mail, letter, design on PDF, or Word template before configuring the job, or else an error appears.

1. On the Categories pane, select **Jobs** under the required communication group.
2. Click the **New Job** icon + next to Jobs.
3. Select **On Demand Mail/Archival** from the list.
   The New On Demand Mail/Archival Job dialog appears.
4. Enter the name of the job.
5. Add a description of the job.
6. Select a suitable template from the dropdown list.

   Only the mail, letter, design on PDF, or Word templates appear in the list.

7. *(Optional)* To add multiple temples, click **Associate Template**.
   The Associate Templates dialog appears. Select the required template from the list and click **Associate**. You can also click **Select All** to select all the templates in the list.
   The template gets associated.
8. Navigate to the required tab and configure the properties. For more information, see Configuring properties.
9. Click **Add** to confirm.

Configuring properties

The on-demand mail/archival job provides the following configuration settings.

The **Mail** tab describes the configuration settings for email communication.

1. Select the **Mail Required** checkbox to specify the configuration settings for email communication.
2. To add an email attachment, set the **Attachment** to Yes and click the **Add Macro** icon ••• to select the required dataset field containing attachment details. Else, set to No.
3. Select a suitable dataset field for the sender's email address.
4. Select a suitable dataset field for the recipient's email address.
5. Select a suitable dataset field for the CC recipient's email address.
6. Select a suitable dataset field for the BCC recipient's email address.
7. Select a suitable dataset field for the sender's email address.
8. Enter the subject for the email. You can also click the **Add Macro** icon ••• to select a suitable dataset field.
9. To specify the email body, you can select any of the following options:
   - **User Defined** — Select this option to define your own custom email body. To achieve this, click the Design Mail Body and enter the required content.

You can also add macro fields in the email content using the **Add Macro** icon •••.

- **HTML Template** — Select this option to use an email template. Select the required template from the dropdown list and then click **Associate Template**. To add an attachment, click the **Add Macro** icon ••• and then select the required dataset field from the dropdown.
  You can also add the template as the email attachment by selecting the **Add the same template as attachment** option.

The **Mail Archival** tab describes the configuration settings for archiving conversations.

1. Select the **Message Archived** option to archive the conversations.
2. Select a suitable DMS from the dropdown.
   Currently, OmniOMS Communication Designer supports only OmniDocs.
3. Enable the **Is Secured** checkbox to secure the information using HTTPS.
4. Select the attributes based on your requirements:
   - **Attachment** — Select this checkbox to archive the attachment in DMS.

     For message communication, do not select the Attachment checkbox.

   - **Communication** — Select this checkbox to archive the communication in DMS.
5. Specify the DMS server address.
6. Specify the DMS server port.
7. Specify the DMS server type. It can be JBoss, JBossEAP, Weblogic, and Websphere.
8. Enter the login ID for the DMS cabinet.
9. Enter the password for the DMS cabinet.
10. Select a suitable cabinet from the dropdown list.

    If the selected cabinet is not registered, a Register button appears. Click the **Register** button to open the Second Immune User Details dialog. Enter the **login ID** and **password** to register the cabinet.

11. Specify the suitable volume, folder, and data class from the corresponding dropdown lists.
12. Click **Add**.
    The selected folder gets added.
13. Click **Get Fields**.
    The fields associated with the selected folder appear in the Map Fields section.
14. Map the required fields with the dataset fields to store the text of the **Message Template**.
    A message box appears.

15. Click **Yes** to save the changes.

The **Print Archival** tab describes the configuration settings for archiving the prints. These configurations are the same as that of the Archival tab mentioned above.

The **Settings** tab describes the settings related to mail, print, and cloud storage.

1. Select the **Mail Settings** checkbox to configure the email settings.
    - **Embed Font** — Select this option to use the same font in the email attachment when any user accesses it.
    - **Apply Password** — Select this option to apply the password in the email attachment.

      This option appears disabled in case no password is applied in the template.

    - **Apply Digital Signature** — Select this option to use the digital signature in the email attachment.

      This option appears disabled in case no digital signature is used in the template.

2. Select the **Print Settings** checkbox to configure the print settings for archival purposes.
    - **Embed Font** — Select this option to use the same font for generating the email attachments, which are archived and later sent as an attachment in the email.
    - **Apply Password** — Select this option to apply the password for generating the email attachments, which are archived and later sent as an attachment in the email.

      This option appears disabled in case no password is applied in the template.

    - **Apply Digital Signature** — Select this option to use the digital signature for generating the email attachments, which are archived and later sent as an attachment in the email.

      This option appears disabled in case no digital signature is used in the template.

3. Select the **Cloud Storage** checkbox to specify the configuration settings for cloud storage.
4. Select a suitable type of storage type from the dropdown list. You can either use Amazon Azure Site or MS Azure Site.
5. Select a suitable site name from the dropdown list.

These site names are created in the OmniOMS Workspace. For more information, see **NewgenONE OmniOMS Installation and Configuration Guide**.

6. If you chose the Amazon S3 Site as the storage type, click the **Get Containers** button and then select a suitable cabinet from the dropdown list.
   If you chose MS Azure Site as the storage type, click the **Get Buckets** button and then select a suitable cabinet from the dropdown list.
7. Then, click **Add**.

Managing templates and jobs

This topic outlines the different ways to manage templates, components, and jobs in the OmniOMS Communication Designer:

- Checking in template
- Checking out template
- Copying template
- Renaming template
- Renaming job
- Baselining template
- Configuring template properties
- Defining decision table
- Saving and previewing template
- Delinking a master layout
- Deleting template
- Deleting job

Checking in a template

Check-in to save all the changes made to the template. A new version of the template gets created each time you check in. By checking in a template, you can allow other users in the cabinet to view and edit the template.

- Ensure to specify the Product Name in the template properties, else an error message appears.
- The process of saving a template is different from that of checking in a template. This is because saving stores the template temporarily. However, when you check in a template, it means it is ready for baselining.

To check in a template, follow the below steps:

1. From the Categories pane, select the required template.

2. Click **More Options** ••• and then select **Check in** from the list.
   The Template Check in dialog appears.

   > If you are checking in the template for the first time, the Check in Version is set to 1.

3. Enter the comment in the space provided.
4. Click **Check in** to confirm.

Checking out a template

Check out a template to make modifications to it.

To check out a template, follow the below steps:

1. From the Categories pane, select the required template.
2. Click **More Options** ••• and then select **Check Out** from the list.
   The template gets checked out.

Copying a template

To copy a template from one location to another, follow the below steps:

1. From the Categories pane, select the required template.
2. Click **More Options** ••• and then select **Copy to** from the list.
   The Copy to dialog appears.
3. Select the category from the list. The category gets expanded and displays the available templates in it.
4. Select the required template from the category.
5. Click **Copy**.
   The template gets copied to the other communication group.

Renaming a template

To rename a template, follow the below steps:

1. From the Categories pane, select the required template.

2. Click **More Options** ••• and then select **Rename** from the list.
3. Input the new name for the template, and then hit the Enter key.
   The template gets renamed.

Renaming a job

To rename a job, follow the below steps:

1. From the Categories pane, select the required job.
2. Click **More Options** ••• and then select **Rename** from the list.
3. Input the new name for the job, and then hit the Enter key.
   The job gets renamed.

Baselining a template

Baseline a template to share the finalized template version with the production server.

> You can baseline only a checked-in template.

To baseline a template, follow the below steps:

1. From the Categories pane, select the required template.
2. Click **More Options** ••• and then select **Baseline** from the list. The Baseline dialog appears. It shows the baseline version, the last checked-in comment, and the baseline version's effective date.
3. These fields are non-editable. By default, the baseline version is effective till the next baseline.
4. Select an effective date from the date picker dropdown for the baseline version. By default, it picks the current date.
5. Enter a comment in the space provided.
6. Click **Baseline**.
   The template gets baselined and is ready to be used for production purposes.

   > If the maker checker functionality is enabled, the baseline request is sent for approval.

Configuring template properties

Before using the template for production purposes, it is necessary to configure the properties of templates. These properties include the basic details of the templates, field configurations, and page setup settings.

The template properties are used at the time of production.

To configure the template properties, follow the below steps:

1. On the Categories pane, select the required category.
2. Expand the selected category and then select the required template.
3. Click **More Options** ••• and then select **Properties** from the list.
   The Template Properties dialog appears. By default, the Details tab is opened. It displays information such as the template name, revision number, type of template, revision comments, and others.
4. On the Details tab, enter the following details:

Property	Description
Product Name	Specify the name of the product. The product name is unique for each template.
Description	Enter the description for the template.
Output Format	Select a suitable type of output format from the dropdown list. This option is only applicable to letter templates, Design on PDF templates, and Word templates.
Attributes	Select the attribute you want to apply on the template: • **Enable demand request** — Select this option to enable the on-demand report generation. This toggle must be enabled since OmniOMS Communication Designer currently supports only on-demand jobs. • **Enable tracking** — Select this option to keep track of email (read, unread, and bounce) and message (delivered or undelivered) status.

5. Go to the **Configurations** tab, and click the **Template Fields** icon ••• to configure the fields to use for the template and job creation.
   In the case of an email template, you also need to select a suitable field for the

sender name, sender email address, recipient email address, CC recipient email address, BCC recipient email address, and email subject.

6. On the Page Setup tab, specify the following details:

> The Page Setup tab is only visible in the case of letter templates.

Property	Description
Orientation	Specify the page orientation type. It can be set to Landscape or Portrait.
Page Layout	Specify the layout of the page. It can be set to Letter, Legal, Tabloid, A3, A4, A5, and B5. You can also specify custom height and width for the page.
Page Width	It indicates the width of the page. This property is disabled by default and shows value based on the chosen page layout.
Page Height	It indicates the height of the page. This property is disabled by default and shows value based on the chosen page layout.
Header Margin	Specify the margin area for the header section on the page.
Footer Margin	Specify the margin area for the footer section on the page.
Left Margin	Specify the margin area for the left side of the page.
Right Margin	Specify the margin area for the right side of the page.
Attributes	Select the required attributes you want to apply: • **Show Header/Footer only on 1st page** — Use this option to display the header or footer sections only on the first page of the template. • **Show Header/Footer from 2nd page** — Use this option to display the header or footer sections from the 2nd page onwards in the template.

7. Click **Save** to apply the changes.

Defining a decision table

A decision table is a collection of conditional logic that determines which action needs to be performed when a certain condition is met. OmniOMS Communication Designer allows you to define multiple decision tables, which are executed based on their sequential order.

The decision rules are only applicable to dynamic content images.
You can create a decision table only in the case of a letter template or design on PDF template. This topics covers the following sections:

- Defining a decision table
- Changing execution order

Defining a decision table

1. On the Categories pane, select the required category.
2. Expand the selected category and then select the required template.
3. Click **More Options** ••• and then select **Decision Table** from the list.
   The Decision dialog appears.
4. Click **+ New Decision Table** to create a new decision table.
5. Specify the name of the decision table. By default, the name of the decision table is set to New Decision Table 1.
6. Click **+ New Condition** to specify a new conditional logic.
   The New Conditional Dialog appears.
7. Specify the name of the conditional logic.
8. Select a suitable macro field from the dropdown. It displays the fields of the linked dataset.
9. Select the type of conditional operator. It can be set to Operator or Range.
   If you select Operator, then select a suitable comparison operator from the dropdown list.

   The Range operator is only applicable to the integer dataset field.

10. Click **Add**.
    The conditional logic gets added and is visible under the Conditionals section.
11. Click **+ New Action** to define the corresponding action for the conditional logic.
    The New Action dialog appears.
12. Enter the following details in the dialog:

Property	Description
Action Name	Specify the name of the action.
Action Type	Specify the type of action. This property is uneditable and is set to Set Image, by default.
Image	Select a suitable image from the dropdown list. This list displays only those images that are used as dynamic content within the template.

13. Click **+ New Row**.
14. Under the Conditions section, enter the value or the range of values that must be satisfied to perform its corresponding action.
15. Under the Actions section, select a suitable image from the dropdown list.
    If the condition logic is met, the selected image replaces the dynamic content image in the template.

    The list only shows the images uploaded on the OmniOMS Admin Workspace.

16. *(Optional)* To add multiple conditional logics and actions, repeat steps 6 to 15.

    The list only shows the images uploaded on the OmniOMS Admin Workspace.

17. Click **Save** to apply the changes.

Change execution order

OmniOMS Communication Designer allows you to change the execution order of the conditional logics. This can be achieved by clicking the up and down arrows next to the required action.

Saving and previewing template

After designing the template, you can save and preview the template to view the final output.

Saving the template

To save a template, click **Save** on the Menu bar.

Previewing template

Preview a template to verify the changes or modifications made to it.

To preview a template, follow the below steps:

1. On the Menu bar, click **Preview**.
2. Select the required preview option from the list:
    - **Preview with File** — Use this option to preview the template by uploading a data file.
    - **Preview with Sample Values** — Use this option to preview the template with sample dataset values.
    - **Preview with Password** — Use this option to preview the template with the applied password. This option is only applicable if any password is set.

      This option is only available for letter templates.

   An Open dialog appears.

   The Open dialog does not appear if you choose to preview the template with sample values.
3. Select a suitable dataset that matches your associated dataset schema, and then click **Open**.
   You can now preview the template design and data.

Delinking a master layout

To delink a master template from the associated layout, perform the following steps:

1. On the Categories pane, select the required template from the list.
2. Click **More Options** ••• and then select **De-Link Master Layout**.
   The master layout is now removed from the template and its pages.

Deleting a template

Delete a template you no longer require.

You cannot roll back the delete operation.

To delete a template, follow the below steps:

1. From the Categories pane, select the required template.

2. Click **More Options** ••• and then select **Delete** from the list.
   The Delete Template dialog appears.
3. Click **Delete** to confirm.

Deleting a job

Delete a job you no longer require.

You cannot roll back the delete operation.

To delete a job, follow the below steps:

1. From the Categories pane, select the required job.
2. Click **More Options** ••• and then select **Delete** from the list.
   The Delete Job dialog appears.
3. Click **Delete** to confirm.

Viewing version history

OmniOMS Communication Designer allows you to view the history of changes for the selected template. This is achieved using the View version history option on the right pane.

In the Version History pane that appears, you can see a list of versions for the selected template. Furthermore, it only lists the checked-in changes. This is because a new version gets created each time you check in a template.

When you hover over the corresponding info icon ⓘ for any template version, it provides the username of who checked in the template, the checked-in time details, and the comment. Additionally, on hovering over the version you also get the following options:

- **Baseline —** Select to baseline the template version. For more information, see Baselining template.
- **Checkout —** Select to check out the template version to make modifications.

In the Version History pane, you can find a particular template version in the search box. To arrange the versions in ascending or descending order, click the up/down toggle next to the column header.

Related topic(s)

Baselining template

Working with object gallery

OmniOMS Communication Designer allows you to add images and texts in the Object Gallery. Object Gallery is a collection of texts and images, which you can use in your templates.

Adding text to Object Gallery

To add text to Object Gallery, follow the below steps:

1. On the right pane of the Communication Designer, select **Object Gallery**.
   The Object Gallery pane appears.
2. On the Texts tab, click **+ New Text**.
   The New Text dialog appears.
3. Enter the following information in the dialog:

Property	Description
Label Name	Enter the label name for the text.
Description	Enter the description for the text.
Content	Enter the text content. You can also format the text by setting the font style and size, making the text bold, italics, or underlined, aligning the text (left, center, right), applying ordered or unordered listing, and specifying the foreground and background color for the text.

4. Click **Add**.
   The new text now gets added. You can simply drag and drop the text on the design canvas.
5. Additionally, you can sort the text in alphabetical order or from new to oldest.

Adding image to Object Gallery

To add an image to Object Gallery, follow the below steps:

1. On the left pane of Communication Designer, select **Object Gallery**.
   The Object Gallery pane appears.
2. Go to the **Images** tab, and then click **+ New Image**.
   The New Image dialog appears.
3. Enter the following information in the dialog:

Property	Description
Label Name	Enter the label name for the image.
Target URL	Specify the target URL for the image, which is an anchor link to another web page. On clicking the image during the preview, you get directed to the required link.
Description	Enter the description of the image.
Image Source	Add an image using any of the following options: • **Browse File** — Select this option to add an image from your local system. • **Image URL** — Select this option to add an image using a valid URL. The supported image formats are .jpeg, and .jpg. • The image URL must be accessible to the application server. • The image URL must end with a "." followed by its file extension.
Preview	It displays the preview of the added image.
Proxy Setting	It allows you to enable or disable the proxy settings for the server. Turn the toggle on to enable the proxy settings and then enter a valid server IP address and port describing the image location.

4. Click **Save**.
5. The added image now appears in the list. You can simply drag and drop the text on the design canvas.
   Additionally, you can sort the text in alphabetical order or from new to oldest.

Working with master layout gallery

The master layout gallery is a collection of local and enterprise (or global) master layouts in the currently signed-in cabinet. The global layouts in the gallery are represented with a icon and local layouts are represented with a icon.

The master layout gallery only displays the checked-in layouts.

The master layout gallery consists of two tabs — All and Associated.

- **All** — It displays the created local and enterprise master layouts. You can use the search box to find a master layout by its name.
  Additionally, you can apply a filter using the **More options** icon to view only the local, enterprise, or both of the master layouts.
- **Associated** — It displays the master layout applied to the template and its page.
  If a new version of the master layout is available, a notification icon appears next to it. You can select the required checkbox next to the layout and then click **Enforce All**. This way the latest version of the master template is now enforced on the associated templates. You can also enforce multiple master layouts at the same time.

Here, using the component gallery you can link a master layout to a template or page and additionally import a master layout. For more information, see Linking a master layout and Importing a master layout.

Working with component gallery

The component gallery is a collection of local and enterprise (or global) components in the currently signed-in cabinet. The global components in the gallery are represented with a icon and local components are represented with a icon.

The component gallery only displays the baselined components.

The component gallery consists of two tabs — All and Associated.

- **All** — It displays the created local and enterprise components. You can use the search box to find a component by its name.
  Additionally, you can apply a filter using the **More options** icon to view only the local, enterprise, or both of the components.
- **Associated** — It displays the component applied to the template and its page.
  If a new version of the component is available, a notification icon appears next to it. You can select the required checkbox next to the component and then click **Enforce All**. This way the latest version of the component is now enforced on the associated templates. You can also enforce multiple components at the same time.

Here, using the component gallery you can link a component to a template or page and additionally import a component. Apart from this, you can delink a component to reuse the same component design on the canvas. For more information, see Linking a component.

Working with NewgenONE Marvin

Marvin is a generative AI assistant designed to enhance your communication designing experience providing various functionalities for generating and improving content. It offers a range of features to support different content needs, from crafting engaging messages to translating and summarizing text. For example, designers can use NewgenONE Marvin to generate content for welcome letters, disclaimers, loan reminders, promotional emails, notifications, and others. Here's an overview of the key features Marvin provides:

- Content generation — Automatically creates content for various templates and communication types based on user input and industry specifics.
- Content improvement — Refines and enhances existing content to make it more effective and engaging.
- Multilingual translation — Translates content into multiple languages to cater to a diverse audience.
- Summarize SMS/WhatsApp — Condenses lengthy messages into concise summaries for SMS and WhatsApp communications.
- Subject line generation — Generates compelling subject lines to increase the open rates of emails.

> To integrate NewgenONE Marvin with Communication Designer, you must register and configure its engine settings in the Others and Marvin tab of Admin Workspace.
> For more information, refer to the *NewgenONE OmniOMS Admin Workspace User Guide*.

For more information about each feature, refer to the following pages:

- Content Generation
- Content Improvement
- Multilingual Translation
- Summarize SMS/WhatsApp
- Subject Line Generation

Generating content

Marvin can help you generate content for various communication needs, such as welcome letters, payment reminders, and promotional materials. You can customize the content based on industry, communication type, and other parameters.

NewgenONE Marvin provides the capability to generate content in different languages and for varied industry types such as banking, insurance, healthcare, and others. In addition, it also allows you to determine the content length and tone. This way, NewgenONE Marvin assists in drafting different textual sections of a communication template and saves your time.

This topic covers the following sections:

- Generating content
- Viewing content version history

Generating content

To use NewgenONE Marvin for generating content, perform the following steps:

1. From the Categories pane, select the required template.
2. Add a Text Control to the template canvas or select the Text Control in which you want to generate the content.
3. From the right, click **Ask Marvin**. The NewgenONE Marvin pane appears on the right.
4. From the Marvin pane, click **Content Generation**.
5. Enter the following information in the corresponding fields:

Field	Description
Industry	It indicates the type of industry for which you want to generate the content. For example, finance and marketing.
Communication Type	It indicates the type of communication content to generate. For example, welcome letters, payment reminders, loans, and others. In case, you select Others, a blank field appears where you can enter the communication type you require.
Word Count	It indicates the word count for generating the content. The word count can range from 1 to 500.

Field	Description
Output Language	It indicates the language in which you want to generate the content. For example, English, Hindi, and French.
Uniqueness	It indicates the uniqueness of the generated content. You can use the slider to set the uniqueness of the content. It ranges from 0 to 1.
Tone	It indicates the tone of language for content generation. For example, the tone of language can be crisp, warning, professional, optimistic, assertive, encouraging, and others.
Additional inputs for GEN AI	It refers to additional instructions you provide to Marvin for generating accurate content.

6. Click **Generate**.
   NewgenONE Marvin takes a few minutes to understand your requirements and then generates the content. To stop the content generation, click **Stop Generate**. If you want to generate the content again, click **Regenerate**. The content gets generated again based on your defined requirements.

Viewing content version history

Communication Designer saves the different versions of the content generated using NewgenONE Marvin. You can view the content history using the Prompt History icon on the top-right corner of the NewgenONE Marvin pane. The Communication Designer can store up to 50 different versions of the content arranged in chronological order. You can select the required version to restore the desired content.

To view the version history of the content generated using NewgenONE Marvin, follow the below steps:

1. On the NewgenONE Marvin pane, click the **Prompt History** icon . The blue dot that appears in the icon signifies there is unread content in the Prompt History list.

   The Prompt History icon appears when you are re-generating content using NewgenONE Marvin.

   The Prompt History lists content generated using NewgenONE Marvin in chronological order with time details.
   You can click **Show More** to view the entire content.
2. (Optional) To delete an unnecessary version of content from the list, hover over the required content and then select **Delete** .

3. Select the required content version you want to use. On selecting, the control uses the selected content version.

Improving content

NewgenONE Marvin provides advanced capabilities for refining and enhancing existing content within OmniOMS. This feature allows you to elevate your text based on specific prompts and improvements, ensuring your communication is tailored and effective.

This topic covers the following sections:

- Improving content
- Viewing content version history

Improving content

To use NewgenONE Marvin for improving content, perform the following steps:

1. From the Categories pane, select the required template.
2. Add a Text Control to the template canvas or select the Text Control in which you want to generate the content.
3. From the right, click **Ask Marvin**. The NewgenONE Marvin pane appears on the right.
4. From the Marvin pane, click **Content Improvement**. The Content Improvement screen appears with the following options:

Field	Description
Fix Spelling and Grammar	Allows you to automatically correct spelling and grammar issues in the selected text.
Tone Adjustment	Allows you to adjust the text tone. You can choose from the following tone options: Crisp, Warning, Professional, Optimistic, Assertive, and Encouraging.
Simplify Language	Allows you to simplify complex language, making it more accessible and easier to understand.
Message Length Optimization	Allows you to optimize the message length according to your preferences.
Language Translation	Allows you to translate the content into the selected language from the following options: English, Hindi, and French.

Field	Description
Additional Inputs	It refers to additional instructions you provide to Marvin for generating accurate content.

5. Click **Generate** to apply the selected improvements to your text. The enhanced text replace the original content in the text box.

Viewing content version history

You can view the content history using the Prompt History icon on the top-right corner of the NewgenONE Marvin pane. You can select the required version to restore the desired content.

To view the version history of the content improved using NewgenONE Marvin, follow the below steps:

1. On the NewgenONE Marvin pane, click the **Prompt History** icon . The blue dot that appears in the icon signifies there is unread content in the Prompt History list.

   > The Prompt History icon appears when you are re-generating content using NewgenONE Marvin.

   The Prompt History lists content generated using NewgenONE Marvin in chronological order with time details.
   You can click **Show More** to view the entire content.
2. (Optional) To delete an unnecessary version of content from the list, hover over the required content and then select **Delete** .
3. Select the required content version you want to use. On selecting, the control uses the selected content version.

Translating multilingual content

NewgenONE Marvin allows you to translate content into multiple languages, helping you reach a broader audience with your communication templates. This feature supports various languages and provides an easy way to ensure your message is accurately conveyed in the target language.

Assume a global insurance company needs to send policy renewal notifications to clients in India, France, and the U.S. Using NewgenONE Marvin's Multilingual Translation feature, the company can translate the content of the email templates into Hindi, French, and English, ensuring the message is accurately conveyed to clients in their preferred language. This enables efficient communication across different regions without manual translation efforts.

This topic covers the following sections:

- Translating content
- Viewing content version history

Translating content

To translate content with NewgenONE Marvin, follow these steps:

1. From the Categories pane, select the required template.
2. From the right, click **Ask Marvin**. The NewgenONE Marvin pane appears on the right.
3. From the Marvin pane, click **Multilingual Translation**. The Multilingual Translation screen appears with the target languages to choose for translating. The available options are:
    - English
    - Hindi
    - French
4. Select the required language and click **Generate**. After generating, you get the translated template with following options:

Option	Description
Add as template	Allows you to add a new template with the translated content and the navigation switches to the new template.
Preview	Allows you to preview the translated template by providing the input file.

- The content in the components and master layouts is not translated.
- You can translate the content inside the text control using this option.

Viewing content version history

You can view the content history using the Prompt History icon on the top-right corner of the NewgenONE Marvin pane. You can select the required version to restore the desired content.

To view the version history of the content translated using NewgenONE Marvin, follow the below steps:

1. On the NewgenONE Marvin pane, click the **Prompt History** icon . The blue dot that appears in the icon signifies there is unread content in the Prompt History list.

   The Prompt History icon appears when you are re-generating content using NewgenONE Marvin.

   The Prompt History lists content generated using NewgenONE Marvin in chronological order with time details.
   You can click **Show More** to view the entire content.
2. Hover over the required revision history, the following option appears:

Option	Description
Add as template	Allows you to add the translated content as a new template.
Preview	Allows you to preview the translated content.
Re-generate	Allows you to re-generate the translated content.
Delete	Allows you to delete the history.

3. Select the required content version you want to use. On selecting, the control uses the selected content version.

Summarizing SMS and WhatsApp Messages

Use the Summarizing feature of Gen AI Marvin to condense and refine your SMS and WhatsApp messages. This feature helps you streamline your communications by summarizing long messages into concise, clear formats.

Assume a customer service team at a bank frequently sends follow-up messages via SMS and WhatsApp to clients regarding pending loan applications. By using NewgenONE Marvin's Summarizing feature, the team can quickly condense lengthy status updates into concise, clear summaries tailored for SMS or WhatsApp, ensuring clients receive important updates in a more digestible format. This helps streamline communication while maintaining the intended tone, whether it's a reminder, update, or response to a query.

This topic covers the following sections:

- Summarizing SMS/Whatsapp messages
- Viewing content version history

Summarizing SMS/Whatsapp messages

To summarize content with NewgenONE Marvin, follow these steps:

1. From the Categories pane, select the required template.
2. From the right, click **Ask Marvin**. The NewgenONE Marvin pane appears on the right.
3. Click **Summarise SMS/WhatsApp**. The Summarise SMS/WhatsApp screen appears with the following options:

Option	Description
Type	Select the type of message you want to summarize: • WhatsApp • SMS

Option	Description
Customization	Click the Customization button to open the Customization dialog. The dialog includes the following settings • **Tone** — Select the desired tone for the summary: ◦ Optimistic ◦ Assertive ◦ Warning ◦ Encouraging • **Uniqueness** — Use the slider to adjust the uniqueness of the summary, ranging from Popular to Creative. • **Set Context** — Specify the context for the summary. ◦ Update ◦ Annoucement ◦ Follow-up ◦ Response to a query

4. After setting your preferences, click the **Generate** button. After generating, you get the following options:

Option	Description
Add as template	Allows you to add a new template with the generated content and the navigation switches to the new template.
Copy	Allows you to copy the content to the clipboard.

Viewing content version history

You can view the content history using the Prompt History icon on the top-right corner of the NewgenONE Marvin pane. You can select the required version to restore the desired content.

To view the version history of the content generated using NewgenONE Marvin, follow the below steps:

1. On the NewgenONE Marvin pane, click the **Prompt History** icon . The blue dot that appears in the icon signifies there is unread content in the Prompt History list.

> The Prompt History icon appears when you are re-generating content using NewgenONE Marvin.

The Prompt History lists content generated using NewgenONE Marvin in

chronological order with time details.
You can click **Show More** to view the entire content.

2. (Optional) To delete an unnecessary version of content from the list, hover over the required content and then select **Delete** .
3. Select the required content version you want to use. On selecting, the control uses the selected content version.

Generating subject lines

Enhance your email marketing efforts by generating compelling subject lines with NewgenONE Marvin. This feature helps create engaging and effective subject lines tailored to your campaign needs.

This topic covers the following sections:

- Generating subject lines
- Viewing content version history

Generating subject lines

To generate subject lines with NewgenONE Marvin, follow these steps:

1. From the Categories pane, select the required template.
2. From the right, click **Ask Marvin**. The NewgenONE Marvin pane appears on the right.
3. Click **Subject line Generation**. The Subject line Generation screen appears with the following options:

Option	Description
Tone	**Tone**: Select the desired tone for the summary: • Optimistic • Assertive • Warning • Encouraging
Uniqueness	Use the slider to adjust the uniqueness of the subject line, ranging from Popular to Creative.

Option	Description
Language Translation	Choose the language for generating the subject line: • English • Hindi • French

4. Set your preferences, and click the **Generate** button to create your subject line. After generation, click the **Add subject line** icon to update the subject line of the template.

Viewing content version history

You can view the content history using the Prompt History icon on the top-right corner of the NewgenONE Marvin pane. You can select the required version to restore the desired content.

To view the version history of the subject generated using NewgenONE Marvin, follow the below steps:

1. On the NewgenONE Marvin pane, click the **Prompt History** icon . The blue dot that appears in the icon signifies there is unread content in the Prompt History list.

   The Prompt History icon appears when you are re-generating content using NewgenONE Marvin.

   The Prompt History lists content generated using NewgenONE Marvin in chronological order with time details.
   You can click **Show More** to view the entire content.
2. (Optional) To delete an unnecessary version of content from the list, hover over the required content and then select **Delete** .
3. Select the required content version you want to use. On selecting, the control uses the selected content version.

Managing user rights

The rights management feature in the Communication Designer allows you to assign access rights to users or user groups and then view those rights. These access rights include permissions to view, create, edit, and enable the maker checker for the categories, enterprise master layouts, and enterprise components.

> To enable the Rights Management functionality in the Communication Designer, set the **enableRightManagement** parameter to Y in the *OMSCommDesigner.ini* file. For more information, refer to the *NewgenONE Administration Guide*.

This topic covers the following sections:

- Assigning access rights
- Viewing access rights

Assigning access rights

OmniOMS Communication Designer allows you to set access rights that determine the type of permission a user or user group has on the categories, enterprise master templates, and enterprise components. By applying access rights, you restrict the users from unauthorized usage and ensure the confidentiality of sensitive data.

For example, a supervisor can assign read-only rights on the enterprise master templates to prevent the user from modifying them.

> Only a supervisor user and owner can assign access rights to the other users. An owner is a non-supervisor user who is responsible for the creation of an object such as a category, communication group, template, master layout, or component. Also, owners can only assign rights to the objects they've created.

The following are the different levels at which you can assign rights to the users:

- **Root Level (+ Categories)** — It consists of categories created in the currently signed-in cabinet. Furthermore, there can be one or more communication groups within a category. A communication group is a collection of templates, master layouts, and components.

- **Enterprise Master Layout** — It consists of master layouts created in the currently signed-in cabinet at the enterprise or global level.
- **Enterprise Component** — It consists of components created in the currently signed-in cabinet at the enterprise or global level.

Before assigning rights at different sublevels, ensure to assign rights to the user at the root level first. This ensures a baseline level of access permissions within the system. These are the different types of access rights you can assign to a user on the categories, enterprise master templates, and enterprise components:

- **Create** — Allows user(s) to create categories, enterprise master layouts, and enterprise components.
  For example, if you assign Create right at the Root Level (+ Categories) level, the user can create one or multiple categories in the Category pane. In a category, you can further create a communication group that contains templates, master templates, and components.

  > The Create checkbox is only enabled at the root level of category, enterprise master layout, and enterprise component. For the sublevels, it appears disabled.

- **Edit** — Allows user(s) to modify the existing categories, enterprise master templates, and enterprise components. With editing rights, users also get the right to create and view, respectively.
  For example, if you assign Edit right for a Banking category, the user can create communication groups within the category that contain templates, master templates, and components. Apart from this, the user can modify the existing category to update its templates or components.

  > The Edit right is disabled at the root level of the category, enterprise master layout, and enterprise component.

- **View** — Allows user(s) to view a category, enterprise master template, or enterprise component.
  For example, suppose you assign View right at the Enterprise Master Layout level. In that case, the user can view all the enterprise and global enterprise layouts created in the currently signed-in cabinet.
- **Maker Checker** — Marks the user as a checker to approve or reject the changes made in a category, enterprise master template, or enterprise component.
  For example, if you assign Maker Checker right for a component namely EmbeddedReport, the user is now responsible for approving and rejecting the changes made by other users in the EmbeddedReport component. For more information, see Approving or rejecting requests.

> The Maker Checker right for categories is available only at the communication group level, and not at the templates, master layouts, and components level.

> If access rights are assigned at sublevels, such as templates, then users are automatically granted view rights at the root level, that is the communication groups and categories templates belong to.

To set access rights for the users, perform the following steps:

1. On the lower-right corner, click **Rights Management**.
   The Assign Rights dialog appears.
2. Set the **Assign To** field to either User or Users Group.
   - Select **User** to assign access rights to a user.
   - Select **Users Group** to assign access to a user group. A user group is a collection of multiple users.
3. From the **Name** dropdown, select the required user or user group from the list. The Name dropdown displays the list of users or user groups depending on the value chosen for the Assign To field. Here, you can view the existing access rights of the users and further modify them.
4. Expand the required section where you want to assign the rights — Root Level (+ Categories), Enterprise Master Template, and Enterprise Component. It also shows the count of master templates and components next to the Enterprise Master Template and Enterprise Component sections.
   - Expand the **Root Level (+ Categories)** section to view the list of available categories. You can further expand the category to view its corresponding communication groups containing templates, master layouts, and components.
     Here, you can assign rights directly to the communication group or separately at the template, master layout, and component level.
   - Expand the **Enterprise Master Template** section to view the list of available enterprise or global master templates.
   - Expand the **Enterprise Component** section to view the list of available enterprise or global components.
5. Assign the required permissions to the categories, enterprise master templates, and enterprise components. Edit, view, and maker checker are the different types of access rights you can apply. For more information, see Understanding access rights.
6. Click **Assign and Close**. The user gets assigned the required access rights.
7. To assign another user with rights, click **Assign and Next**, and then repeat the above-mentioned steps.

Viewing access rights

OmniOMS Communication Designer allows you to view your access rights available on different categories, enterprise master layouts, and enterprise components. These access rights include permissions to view, create, edit, and enable the maker checker for the categories, enterprise master layouts, and enterprise components.

You can view the access rights only if you are a non-supervisor user.

- **Create** — Right to create a category, enterprise master template, and enterprise component.
  Within a category, you can create one or more communication groups in the Category pane. A communication group is a collection of templates, master templates, and components.
- **Edit** — Right to modify an existing category, enterprise master template, or enterprise component. Right to modify the existing categories, enterprise master templates, and enterprise components. With editing rights, users also get the right to create and view, respectively.
- **View** — Right to view the communication groups, templates, master templates, and components within a category, enterprise master template, or enterprise component.
- **Maker Checker** — Right to approve or reject the changes made to a category, enterprise master template, or enterprise component. Here, the user acts as a checker for the changes made to the existing categories, enterprise master templates, or enterprise components.

To view the access rights, perform the following steps:

1. On the lower-right corner, click **Rights Management**.
   The Assign Rights dialog appears.
2. Navigate to the **My Rights** tab to view your assigned rights.
   You can expand the following sections to view your rights at the category, enterprise master layout, and enterprise component level.
   - Expand the **Root Level (+ Categories)** section to view your rights on the categories. You can further expand the category to view the rights on its corresponding communication groups containing templates, master layouts, and components.

- Expand the **Enterprise Master Template** section to view your rights on the enterprise or global master templates.
- Expand the **Enterprise Component** section to view your rights on the enterprise or global components.

The My Rights tab is only visible to non-supervisor users.

3. Click **Close** to exit the dialog.

Managing approval requests

The maker checker functionality of the Communication Designer requires at least two users for baselining the communication templates and components (both enterprise and local). In this process, one of the users is the maker who baselines the templates and components. The other user is the checker who accepts or rejects the request to baseline the templates and components.

To enable the maker checker functionality in the Communication Designer, set the **enableMakerChecker** parameter to Y in the *OMSCommDesigner.ini* file.

This functionality adds a layer of security, reducing the risk of errors and unauthorized actions. The maker checker functionality is only applicable for baselining templates and components.

For more information, see Baselining templates and Managing components.

When a maker baselines a communication template or component, an approval request is sent to the checker, who further verifies, approves, or rejects it. Such requests are managed using the Maker Checker icon available on the lower-right corner of the page.

This section covers the following topics:

- Approving or rejecting approval requests
- Viewing sent approval requests

Approving or rejecting approval requests

The Received tab of the Maker Checker dialog displays the approval requests for baselining a communication template or component.

To approve or reject a request, perform the following steps:

1. On the lower-right corner of the page, click **Maker Checker**.
   The Approvals dialog appears.
2. Go to the **Received** tab. It lists all the received approval requests with the object type name, communication group name, category name, initialization date and time, requester name, baseline version, and baseline comment.
   Here, the object type name refers to the name of the baselined communication template or component. While, the approval status indicates the current status of your request, which can either be in pending approval or rejected state.
3. To check and verify the communication template or component, hover your mouse cursor over the required object type and then click **Preview**.
   An Open dialog appears.
4. Select the associated XML or JSON dataset to view the data in your communication template or component.
5. Click **Approve** or **Reject** to accept or decline the approval request.
   - If you click **Approve**, an Approve dialog appears. Enter the required comment in the comment box, and then click **Approve**. The request is now approved by the checker.
   - If you click **Reject**, a Reject dialog appears. Enter the required comment in the comment box, and then click **Reject**. The request is now declined by the checker.

Viewing sent approval requests

The Sent tab of the Maker Checker dialog displays the approval requests sent to the checker by the users. These requests are sent to baseline a communication template or component.

To view the sent approval requests, follow the below steps:

1. On the lower-right corner of the page, click **Maker Checker**.
   The Approvals dialog appears.
2. Navigate to the **Sent** tab. It lists all the sent approval requests with the object type name, communication group name, category name, initialization date and time, baseline version, baseline comment, and approval status with comments, if any.
   Here, the object type name refers to the name of the baselined communication

template or component. While, the approval status indicates the current status of your request, which can either be in pending approval or rejected state. Furthermore, you can use the search box to find the approval requests by the object type name.

3. (Optional) Hover your mouse cursor over the comment icon to view the approval status comment.
4. (Optional) To filter the approval requests based on the object type or status, click the **Object Type** or **Status** dropdown, respectively. The supported object type values are template and component. While the supported status values are pending approval or rejected.

Defining an output format

OmniOMS Communication Designer allows you to specify the output format for the email attachments. The supported output formats are PDF or DOC/DOCX. These output formats vary based on the template selection.

- Letter template supports only PDF format.
- Design on PDF template supports only PDF format.
- Word template supports both PDF and DOC/DOCX formats.

To define an output format, follow the below steps:

1. From the Categories pane, expand the required communication group.
2. Click the **New Output Format** icon next to the Output Formats.
   The New Output Format dialog appears.
3. Enter the name of the output format.
4. Enter the description for the output format.
5. Specify the output format. It can either be PDF or DOC/DOCX.
6. Specify the color mode for the output format. It can be color or greyscale.

   The Color Mode field is enabled only in the case of PDF output type.

7. Click **Add**.
   The output format gets added.

Tutorials

This topic gets you started with the basics of creating an email and WhatsApp template. This topic includes the following:

- Creating email template
- Creating WhatsApp template

Creating an email template

This topic explains quick steps to create an email template.

1. Sign in to the OmniOMS Communication Designer using the following URL: *http://<ip_address>:<port_number>/omniomscommdesigner/#/login*
2. Go to the Category pane and create a new category.
   A new category gets added in the Category pane. For procedural details, see Adding category.
3. Within the category, create a new communication group. A communication group can be of two types — Common Dataset and Mixed Dataset Communication Group. For procedural details, see Adding communication group.
4. *(Optional)* In case, you created a common dataset communication group, then you need to link with the dataset. For procedural details, see Linking communication group with dataset.
5. Select **Templates** and then click the **New Template** icon .
   A list of available templates appears.
6. From the list, select **Email Template**.
7. *(Optional)* In case, you created a mixed dataset communication group, then link your template with the dataset. For procedural details, see Linking template with dataset.
8. Design your email template based on your requirements. You can drag and drop the required controls from the Control toolbar to the sections. Additionally, you can also apply various formatting options to modify the text styles. For information on controls, see Adding controls.

9. **Save** the template.
10. Check in your template to commit your template changes. For procedural details, see Checking in template.
11. Baseline your template to use for production purposes. For procedural details, see Baselining template.
12. On the Categories pane, select **Jobs** and then click the **New Job** icon.
    A list of available jobs appears — On Demand Message/WhatsApp and On Demand Mail/Archival.
13. From the list, select **On Demand Mail/Archival**.
14. Configure the job properties based on your requirements. For procedural details, see Creating on demand mail/archival job.

Creating a WhatsApp template

This topic explains quick steps to create a WhatsApp template.

1. Sign in to the OmniOMS Communication Designer using the following URL:
   http://<ip_address>:<port_number>/omniomscommdesigner/#/login
2. Go to the Category pane and create a new category.
   A new category gets added in the Category pane. For procedural details, see Adding category.
3. Within the category, create a new communication group. A communication group can be of two types — Common Dataset and Mixed Dataset Communication Group. For procedural details, see Adding communication group.
4. *(Optional)* In case, you created a common dataset communication group, then you need to link with the dataset. For procedural details, see Linking communication group with dataset.
5. Select **Templates** and then click the **New Template** icon.
   A list of available templates appears.
6. From the list, select **WhatsApp Template**.
7. *(Optional)* In case, you created a mixed dataset communication group, then link your template with the dataset. For procedural details, see Linking template with dataset.
8. Design your WhatsApp template based on your requirements. You can drag and drop the required controls from the Control toolbar to the design canvas. Additionally, you can also apply various formatting options to modify the text styles. For information on controls, see Adding controls.

9. **Save** the template.
10. Check in your template to commit your template changes. For procedural details, see Checking in template.
11. Baseline your template to use for production purposes. For procedural details, see Baselining template.
12. On the Categories pane, select **Jobs** and then click the **New Job** icon .
    A list of available jobs appears — On Demand Message/WhatsApp and On Demand Mail/Archival.
13. From the list, select **On Demand Message/WhatsApp**.
14. Configure the job properties based on your requirements. For procedural details, see Creating on demand message/Whatsapp job.