Message Manager 3.0 Feature Set Up

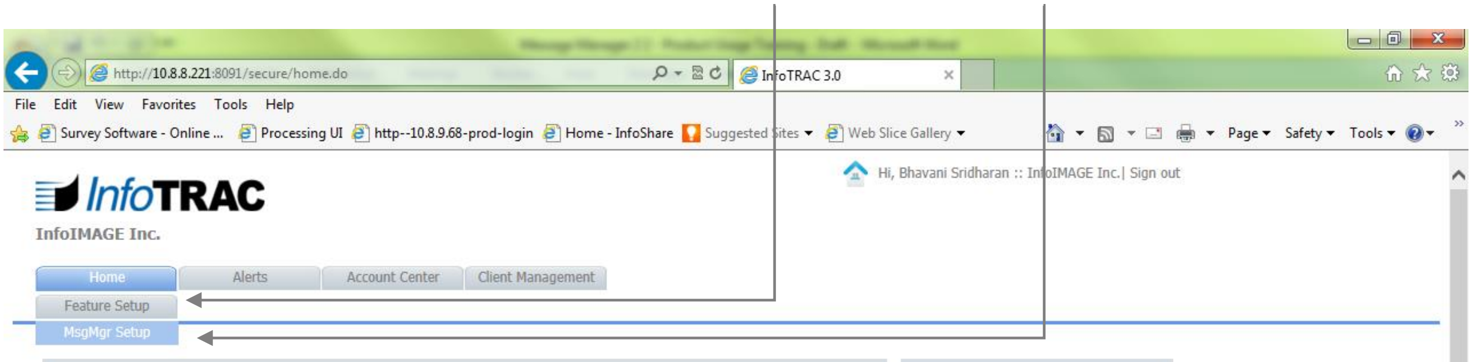
ISD User Guide

Date: July 2013

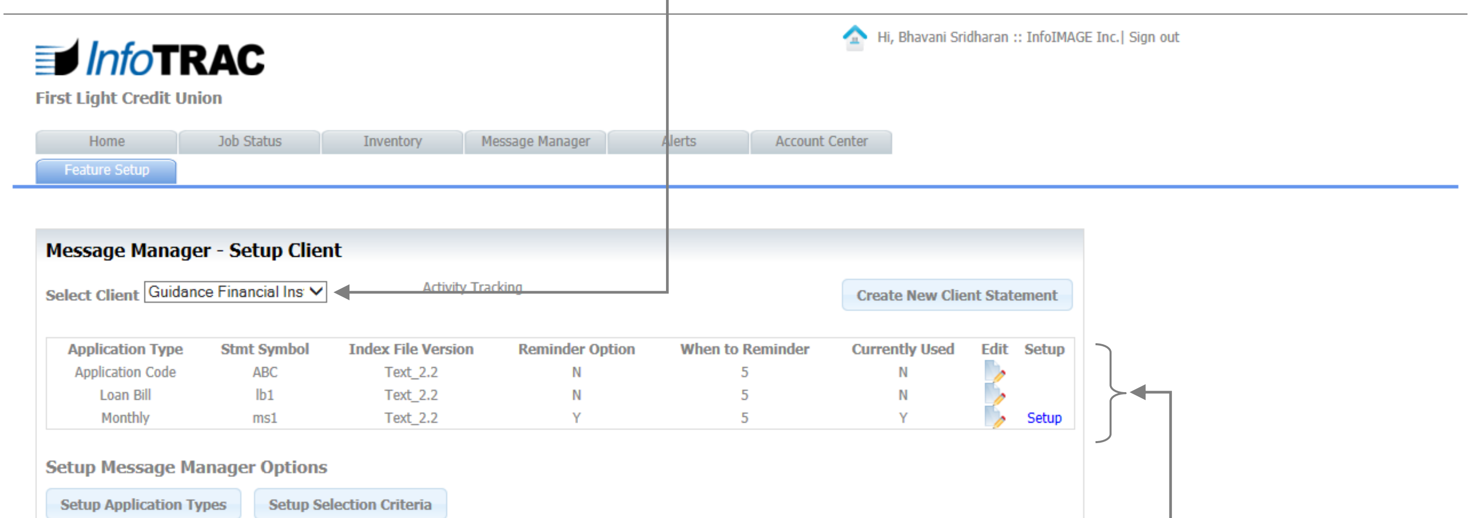
Contents

1.0 Set up / Edit - new client statement in Message Manager

1. To access the Message Manager set up, Click on the Feature Setup tab and select MsgMgr Setup



2. From the drop down list select the client that is to be set up.

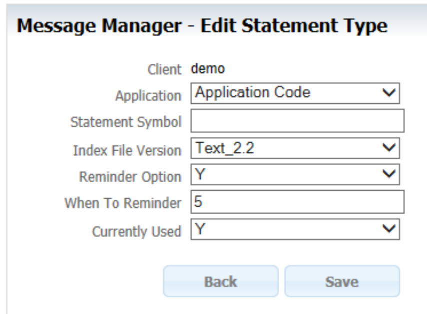


3. A list of all applications that have already been set up will be listed.

1.1 Set up a New Client Statement

1. Click on the Create New Client Statement button

and the following screen will appear:



2. Complete the following details:

a. Application: Use the drop down menu to select the correct application to be set up

b. Statement Symbol: enter the unique stmt symbol used for the application as per the naming convention (eg MS1 – Monthly Statement, MS2 – Quarterly Savings, MV1 – Monthly Visa, ME1 – Loan Statements)

c. Index File Version: Use the drop down menu to select the correct Index File Version

d. Reminder Option: Select Y or N for the reminder option

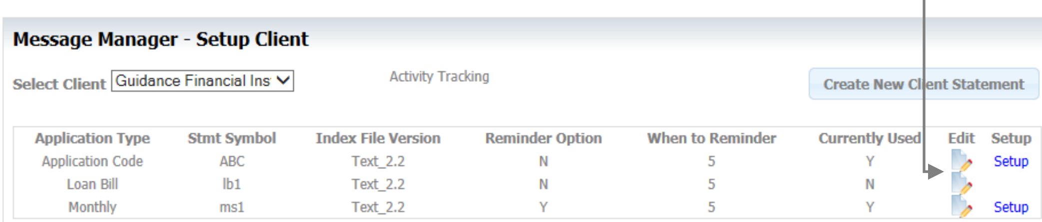
e. When to Reminder: Enter the time (in days) for the reminder to appear (standard is 5)

f. Currently Used: Select Y or N from the drop down list – if the client has the application but not using the message service, select N, if the message service is going to be set up, select Y.

3. Click on the Save button once completed

1.2 Editing an existing application set up

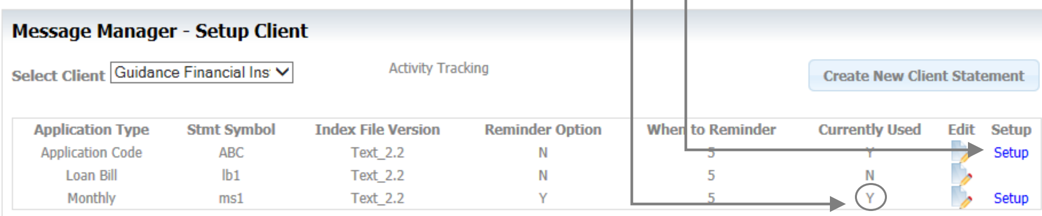
1. To edit any of the application set up details (such as to make an application active), click on the edit button on the application requiring editing



2. Once selected, all of the Statement Type details will appear and can be edited. Once completed click on the Save button.

2.0 Set up / Edit - Message Manager Area for an application

1. Click on Setup for the application that is to be completed. If the set up button does not appear, check to ensure that the Currently Used field is set to Y.

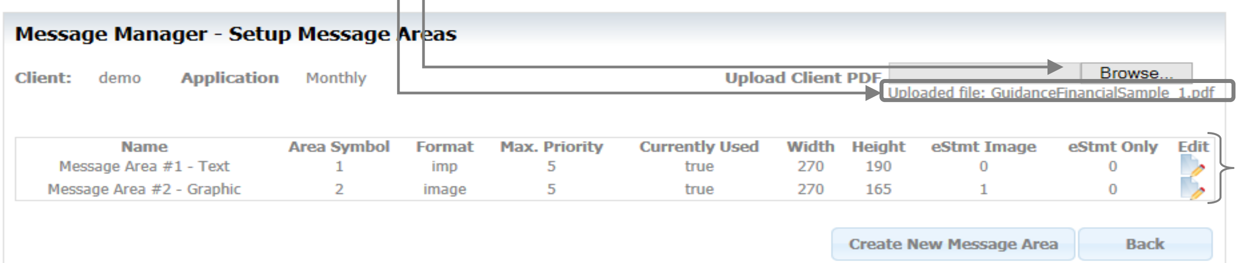


Message Manager - Setup Client

Select Client: Guidance Financial Ins | Activity Tracking | Create New Client Statement

Application Type	Stmt Symbol	Index File Version	Reminder Option	When to Reminder	Currently Used	Edit	Setup
Application Code	ABC	Text_2.2	N	5	Y		Setup
Loan Bill	lb1	Text_2.2	N	5	N		
Monthly	ms1	Text_2.2	Y	5	Y		Setup

2. Upload a pdf sample of the statement (this allows a 'wysisyg' in the edit screen). Once uploaded, the pdf name will be displayed below.



Message Manager - Setup Message Areas

Client: demo Application: Monthly

Upload Client PDF: Browse...

Uploaded file: GuidanceFinancialSample_1.pdf

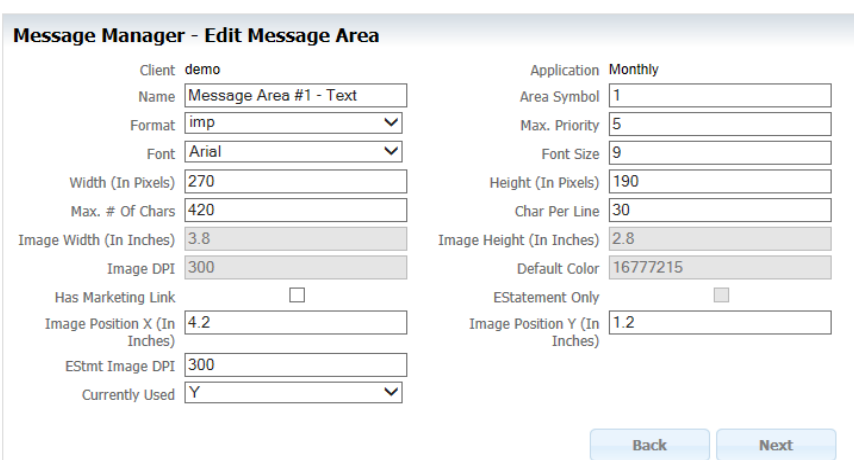
Name	Area Symbol	Format	Max. Priority	Currently Used	Width	Height	eStmt Image	eStmt Only	Edit
Message Area #1 - Text	1	imp	5	true	270	190	0	0	
Message Area #2 - Graphic	2	image	5	true	270	165	1	0	

Create New Message Area | Back

3. If an existing message area(s) have been set up, this will appear on the screen and can be edited.

2.1 Setting up of a new Message Area

1. Click on the Create New Message Area button **Create New Message Area**
   The following screen will appear as well as the sample of the pdf statement previously uploaded.



Message Manager - Edit Message Area

Client	demo	Application	Monthly
Name	Message Area #1 - Text	Area Symbol	1
Format	imp	Max. Priority	5
Font	Arial	Font Size	9
Width (In Pixels)	270	Height (In Pixels)	190
Max. # Of Chars	420	Char Per Line	30
Image Width (In Inches)	3.8	Image Height (In Inches)	2.8
Image DPI	300	Default Color	16777215
Has Marketing Link		EStatement Only	
Image Position X (In Inches)	4.2	Image Position Y (In Inches)	1.2
EStmt Image DPI	300		
Currently Used	Y		

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2. Complete the following details:

a. Name: Record the name for the message area (there may be multiple message areas for the statement, so use a title that best describes the area for the message)

b. Area Symbol: Record Message area symbol such as 1, 2, 3 etc.

c. **Format:** Select from imp or image. Based on the selection, some of the size fields will gray out and some will become active. (Please note the image can be any format and will be converted to TIF format @ 300 DPI)

d. **Max. Priority:** Record the maximum number of priority messages for the message area *(Note: there can be up to 5 priority messages for each message area with one being the default message)*

e. **Font:** Record the font of the text for the message

f. **Font Size:** Record the font size to be used for the text in the message

g. **Width (In Pixels):** to be recorded if IMP has been selected as format (use 96*Inches and then adjust by comparing size in message box if required)

h. **Height (In Pixels):** to be recorded if IMP has been selected as format (use 96*Inches and then adjust by comparing size in message box if required)

i. **Max. # of Chars:** Record the total number of characters that can be entered into the message area

j. **Char per Line:** Record the total number of characters that can be fit onto 1 line

k. **Image Width (In Inches):** record the width allowed for the Image as matched with the IS dimensions (when Image has been selected from the format or Marketing Link has been checked)

l. **Image Height (In Inches):** record the height allowed for the Image as matched with the IS dimensions (when Image has been selected from the format or Marketing Link has been checked)

m. **Image DPI:** Record the DPI (when Image has been selected from the format)

n. **Default Color:** Record the default color (when Image has been selected from the format)

o. **Has Marketing Link:** Check if a link is to be included. If checked, the following details will also need to be recorded:

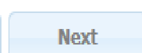
   p. **EStatement Only:** Check if link will only be displayed on the eStatements

   q. **Image Position X (in Inches):** Record the X position of the link

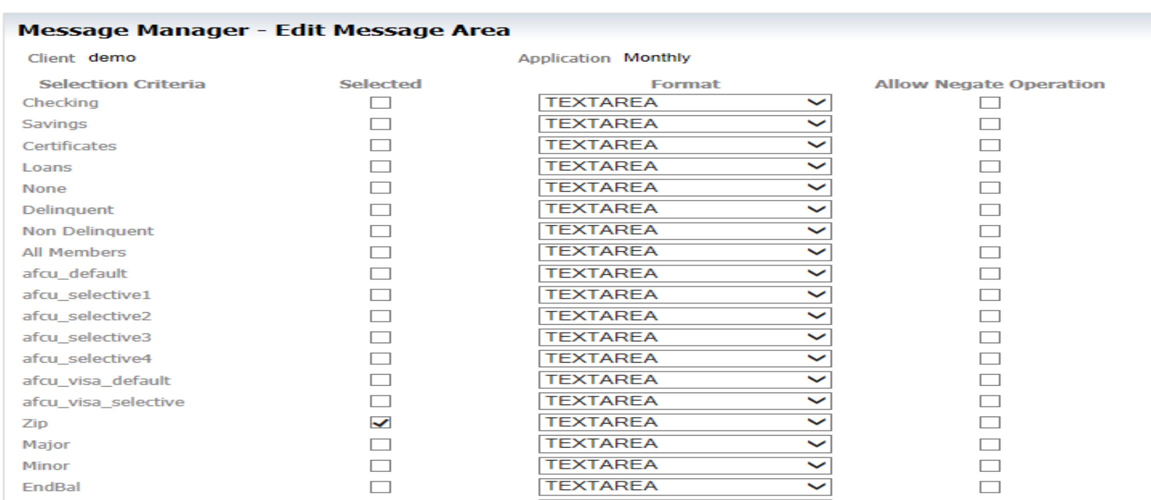
   r. **Image Position Y (in Inches):** Record the Y position of the link

   s. **EStmt Image DPI:** Record the eStatement Image DPI

t. **Currently Used:** Select Y or N

3. Once these fields have been completed, click on 

and the following screen will appear:

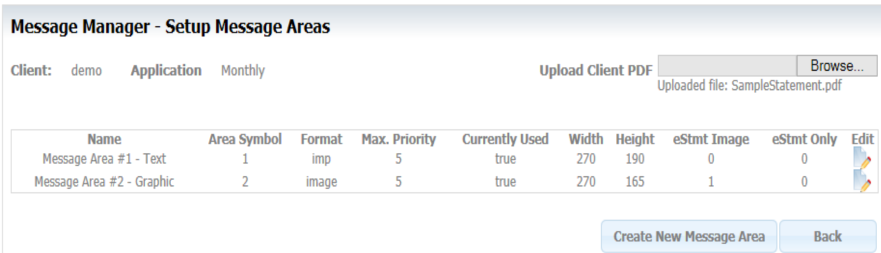


4. Select the Message Criteria required by selecting the check box and using the drop down list pick the format for each criteria required. **NOTE: It is imperative that this is consistent with the message areas as this will link to the criteria in the Campaign screen.**

5. Click

2.2 Editing an existing Message Area

1. To edit any of the Message Area details, click on the edit button on the application requiring editing



2. Once selected, all of the Message Area set up details will appear and can be edited. Once completed for both screens, click on the Save button