Product Quality Customer Response Email Template Editor

Based on CKEditor (<http://ckeditor.com>)

Hosted on GitHub (<https://github.com>)  
<https://github.com/ProductQualityTeam-InternalTools/ProductQualityTeam-InternalTools.github.io>

This editor supports the following parameters in the URL. Those marked with red are required for full functionality.

* email – Email address. Used by the plugin to populate the To field when opening the new email. Multiple, comma-separated addresses may be used.
* name – Customer’s name. When the template is loaded, if this is supplied and batch is set to 0, the first instance of “TurboTax Customer” will be replaced with the value of this parameter.
* batch – If 0 or omitted, the template will attempt to replace “TurboTax Customer” with the customer’s name.
* case – The CSI case number. If this is not supplied, the editor will show a warning and be unable to record the email to the Quickbase. This will also be used to replace [CASE ID] in any templates with that string.
* temp – Template name. The name of the template to load from EmailTemplates.html. If this is omitted, a blank TurboTax template will load. This is also recorded to the Quickbase along with the body of the email.
* bcc – Email addresses to include in the bcc field when opening the new email. Multiple, comma-separated addresses may be used.
* sub – Email subject to include in the subject field when opening the new email. If omitted, the default subject will be used.

URL parameters are passed in the format (The browser will automatically substitute spaces some other characters as needed):  
*https://intuitcorp.quickbase.com/db/bgkvndpnt?a=dbpage&pageID=126&email=email@example.com &name=John%20Doe&batch=0&case=11111&temp=Try%20This%20To%20Fix*

To add or update a template, edit the EmailTemplates.html page in the Quickbase. More details on the exact format of the template can be found there.

To update the default header/footer, edit the TemplateEditor.html page in the Quickbase. Paste the HTML of the new template inside the <div> tag with the id “editor” (between <div id=”editor”> and the next </div>). The body of the email is identified by a <td> tag with the id “body” (<td id=”body”></td>). This is where the template from EmailTemplates.html is inserted and the section that’s recorded in the Quickbase. This tag/id combination must be present for the editor to function properly.

Required Files (Some default CKEdit files omitted)

-Quickbase Pages  
--EmailTemplates.html  
--TemplateEditor.html  
-Remote Files  
--<lang>  
--<plugins>  
---<email>  
--<skins>  
--ckeditor.js  
--config.js  
--contents.css  
--inited.js  
--styles.js

# Quickbase HTML Pages:

## EmailTemplates.html

Stores all of the email templates used by the editor. Each template is stored in a <span> with an id that matches the template name in the dropdown on the form in Quickbase. All characters except the following must be replaced with \_ in the template file. A-Z a-z 0-9 . : \_ -  
Example: The dropdown in the Quickbase shows **Request For Sanitized Tax File (TTO)**The template would look like:

<span id=”Request\_For\_Sanitized\_Tax\_File\_\_TTO\_”>  
 ***html here***  
</span>

The html content will be inserted into the default template, between the header and footer.  
[CASE NUMBER] will be replaced with the record id of the case. The first instance of “TurboTax Customer” will be replaced with the customer’s name, if present in the case.

## TemplateEditor.html

Stores the editor itself. A simple page with the basic template (headers, footer) used for all emails. If you need to adjust the header or footer, edit this file.  
This file contains references to three scripts on lines 5-7.

* The first, ckeditor.js, is the editor itself stored on github.
* The second, inited.js, initializes the editor in TemplateEditor.html and runs the replacements for customer name and case number. This file is also stored on github.
* The last is jQuery, hosted by Google.

This file also contains a reference to EmailTemplates.html on line 13. If the location of EmailTemplates.html changes, it must be updated here.

# Remote Files:

## Config.js

CKEditor 4 configuration file. For detailed reference, see: <http://docs.ckeditor.com/#!/api/CKEDITOR.config>

Important custom settings:

### config.extraPlugins = ‘email’

This loads the custom plugin (TT Checkmark icon) that selects the email, copies it, starts a new email and records the email to Quickbase.

### config.extraAllowedContent = ‘\*[id](\*){\*}’

This line instructs CKEditor to allow the id property in the html for the templates. This is needed because the email plugin looks for ‘id=body’ to identify the body of the email.

### config.templates\_files = [ 'CKEditor/plugins/templates/templates/TT-templates.js' ]

This points to the templates loaded by the default template button (directly left of the email button). The only template currently available is a blank template, with the standard headers and footers. New templates can be added in the file shown above.

## Email plugin

The TurboTax Email plugin (TT Checkmark Icon) is a custom plugin that selects the contents of the editor, copies it to the clipboard, opens a new email pre-populated with the email address and subject and records the body of the email to Quickbase.

The plugin will read the following parameters from the URL:

* email – The primary email address for the ‘to’ field. Multiple, comma-separated, addresses are allowed. This field may be omitted.
* bcc – Additional addresses for the bcc field. Multiple, comma-separated, addresses are allowed. This field may be omitted.
* sub – The subject for the email. This field may be omitted. If this is not supplied, the default will be used.

The important parts of the main plugin file, CKEditor\plugins\email\plugin.js, are the default email subject line on line 16 and the Quickbase API details on lines 71-73. If the Quickbase Token number, DBID or FID need to be updated, it must be done here.