



# iMailBranding Signature Setup – ver 1.1





## 1. Purpose

The purpose of this document is to detail the steps to set up iMail Branding

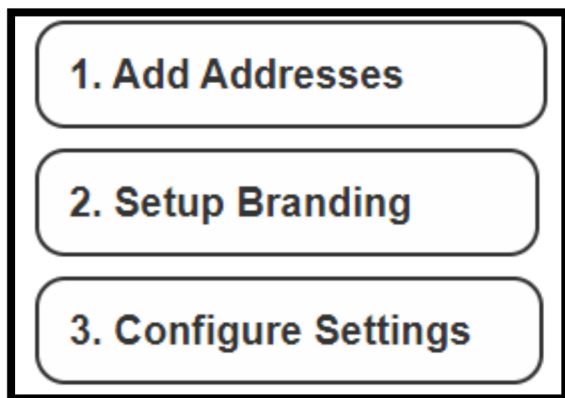
Signatures.

## 2. Guidelines on Training Branding

### 2.1. Getting Started with iMail Branding

Always start explaining to clients or staff members that there are always 3 sections that will need to be completed before you can enable Branding.

Those 3 sections are as per below:



You will need to discuss each step-in detail before any branding can be setup and tested.

## 3. Adding Email Accounts on Branding

As per point 2.1. We will start with step 1, which is to *“Add Addresses”*

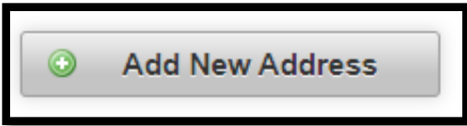
This section is located in the main tab called *“Addresses”*

You can add email accounts in 2 ways:

- Using *“Add New Address”* button
- Or *“Import Addresses”*

### 3.1. Add New Address

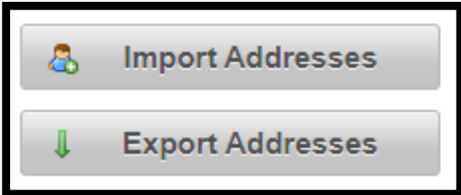




When using this function, you will only be able to add one user at a time. It is recommended that the first address must be added via this method for testing purposes and when exporting the email address list; the format of the csv file will include the default columns.

A dialog box titled "Add one or more Email Addresses to your account." with a close button in the top right. Below the title is the text "Licenses: Used 55 of 9999". The main area contains a table with six columns: "Email Address", "First Name", "Last Name", "Job Title", "Tags", and "Action". Each of the first five columns has an empty input field. The "Action" column contains a green "Add" button. Below the table is a blue banner with the text "Want to import a list of addresses from a spreadsheet? Click here." and a download icon. At the bottom right of the dialog is a red "cancel" link.

### 3.2. Importing Addresses

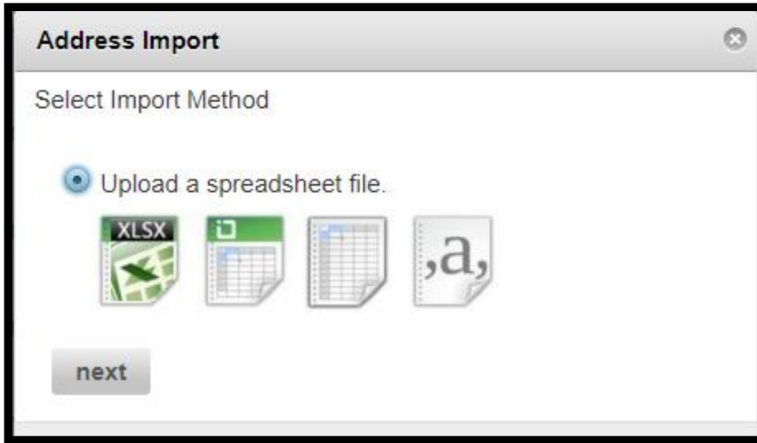


As per point 3.1. client to add a single email account to allow the exported csv file to contain all default columns.

Export first to generate a csv file that can be imported back later when doing a bulk upload.

Additional columns can be added for more fields, such as Cell number or Fax number.

Once all the details of each users have been filled in to click on "Import Addresses" and use the saved csv file for the upload.



## 4. Setup Branding

Step 2 in the process refers to setting up the Branding, which is two things:

- The Signature
- And the Campaign

Below are the guidelines in creating and setting up both.

### 4.1. Signatures

This is the section where clients will customize logos and link their credentials to each mail sent. FYI, this is a global template which will be applied for each email account.

Advise clients that they can pick from a wide variety of templates as per screenshot below:



## Manage Signatures

### Signature Layout Gallery

### Preview

➔ Use this Layout [hide](#)



**Classic Logo Bottom**  
the classic signature layout with a logo below the signature elements.

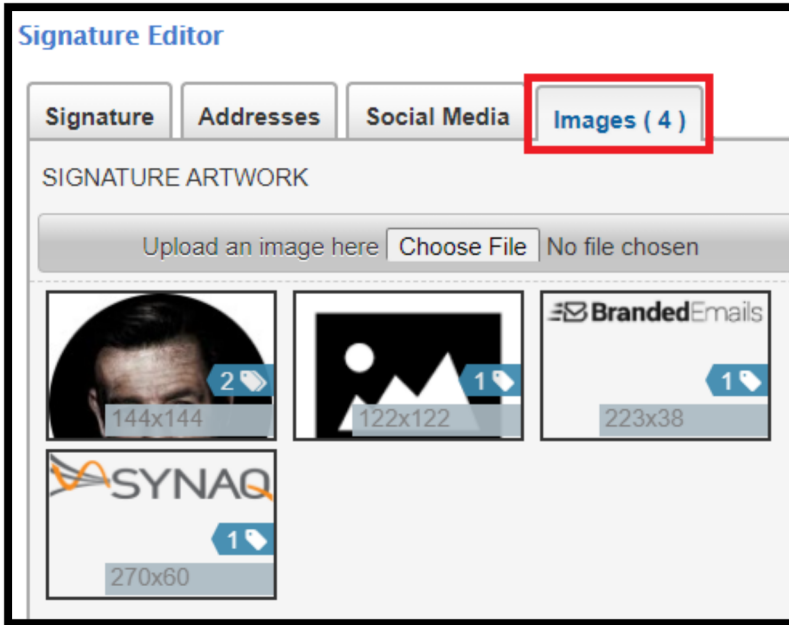
### 4.1.1. Signature Editor

Section where the template can be edited and updated with additional “*Signature Fields*”

There are 4 tabs that will be used when editing the signature.

#### 4.1.1.1. Images (Artwork Tab)

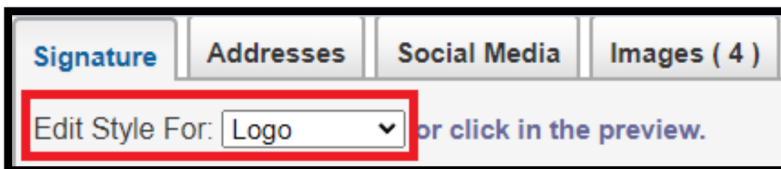




This is the first tab that should be discussed, as a logo will need to first be uploaded before editing the signature fields.

*The image should not be more than **500px** wide and **100KB** in size.* This is due to images being displayed differently in mail clients, and a larger image will make the email overall size much larger and likely be quarantined for exceeding mail restrictions.

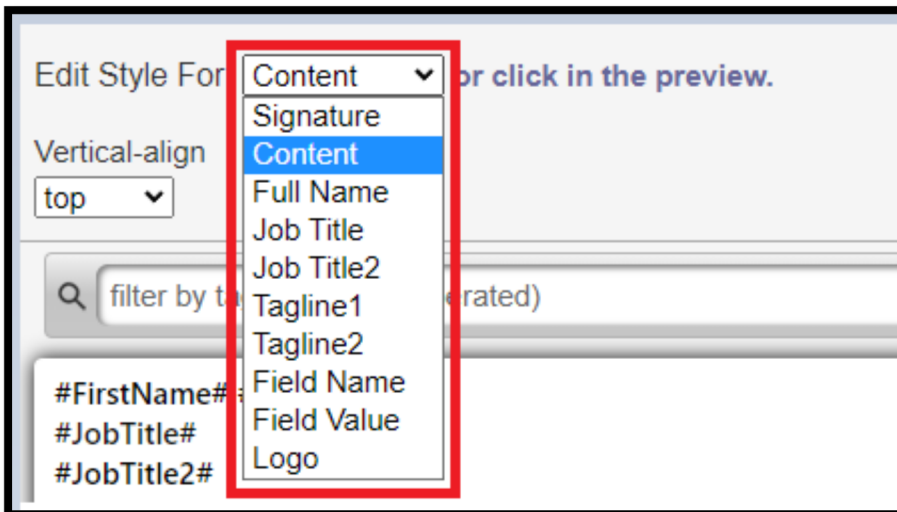
Once uploaded the images will be available in the logo editing section.



#### 4.1.1.2. Signature (Style Editor)



The style editor will work on the template that you have chosen for your signature layout. Discuss in detail each item in the drop-down section seen in the screenshot below



Adding additional Field Names can be done by clicking on the "Add Signature Field" button



These signature fields are the extra columns added when updating the import csv file when creating the addresses. Example: Cell or Physical address.

There are 2 ways of adding an additional field:

- Hashtag assignment

This method links the HTML code to the addresses list, to locate the specific field in the email account details. You will pick these attributes from the “Existing” fields.

The screenshot shows a dialog box titled "Add a signature field" with a close button in the top right corner. Below the title is the instruction "Add a new signature field to this template". There are two main sections: "Display Name:" with a text input field containing "Cell:" (highlighted with a red box), and "Default Value:" with a dropdown menu. The dropdown menu is open, showing a list of options: "System", "First Name", "Last Name", "Job Title", "From Address", "Date/Time", "To Address", "Existing" (highlighted with a red box), "Blog", "Branch Name", and "Cell" (highlighted with a blue selection bar and a red box).

This screenshot shows the same "Add a signature field" dialog box. The "Display Name:" field contains "Cell:" and the "Default Value:" dropdown is set to "Cell". At the bottom of the dialog, there are two buttons: "Add" (highlighted with a red box) and "Cancel".







Example: [iMail@iMail.com](mailto:iMail@iMail.com) has a cell number saved in its details under the Addresses tab.

When using HTML coding #Cell# , the signature will know to locate the cell number in that email accounts details.

- Hard coding

Hard coding is when you input a source into the signature where it will always be applied no matter who is sending the mail.

Example: Office Telephone number is the same for all users listed.





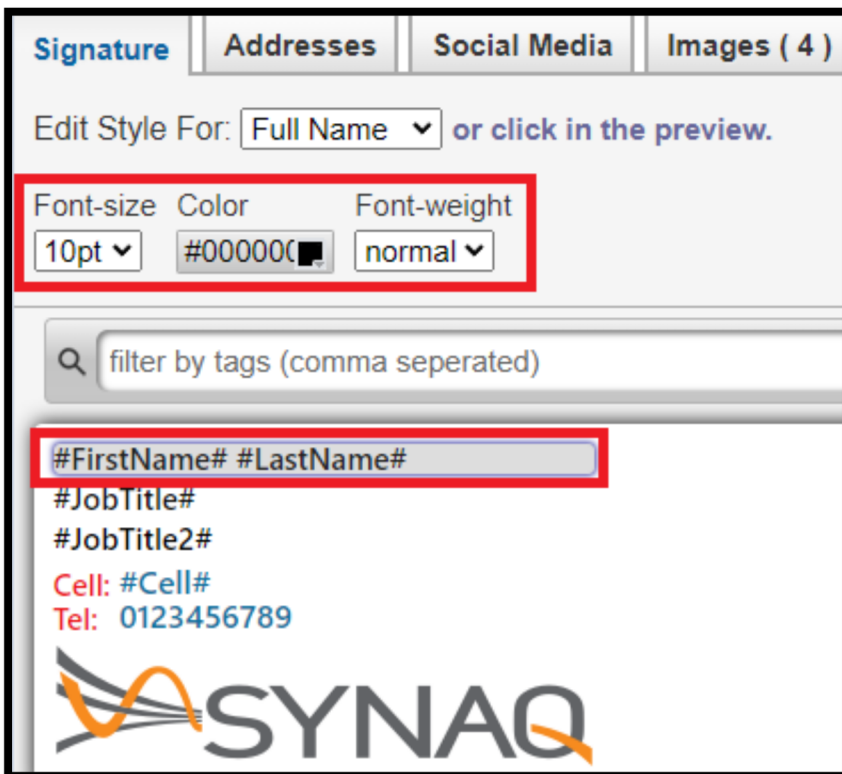
- Saving Progress

Whenever you make changes on the editor remember to “Publish Changes” as this is the save button



- Editing Font

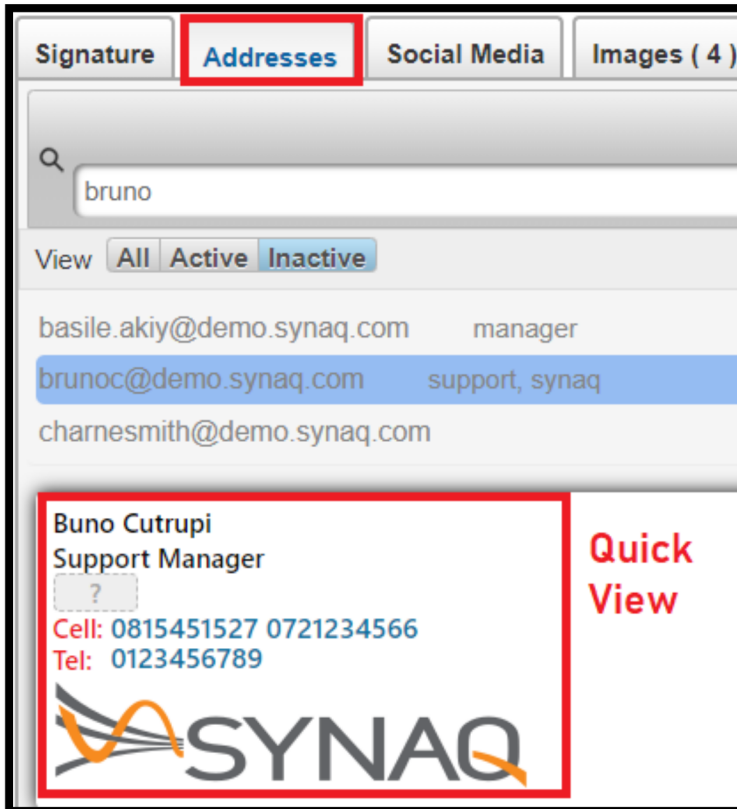
Discuss in detail, that you can click around the signature and edit each part that is highlighted. Be it Font Size, Font Colour and even Font-Weight.



#### 4.1.1.3. Checking Progress (Addresses Mini Tab)

In the editor, there is a tab for Addresses, do not confuse this with the main tab in main point number 3. You can choose an email account in that list to have a quick look of what the signature will look like.

Example:



You will notice there is a grey question mark in the quick view, this is due to the Hash Tag code not finding anything in the example mailbox. This will be removed when the live version is sent through.

#### 4.1.1.4. Adding Social Media Clickable Buttons

The editor can also include social media in the signature. Open that section by clicking on the Social media tab in the editor





Once activated, a section will be given to choose which social media you would like to include. FYI, all links must start with `http://` or `https://` as this will allow our system to pull data on who and when recipients click on those links.

You will also be able to choose from 3 different icon styles as seen in the screenshot below

<input checked="" type="checkbox"/>	Facebook	<code>https://www.facebook.com</code>
<input checked="" type="checkbox"/>	Pinterest	<code>https://www.pin.com</code>
<input checked="" type="checkbox"/>	Twitter	<code>https://twitter.com/SYNAQ</code>
<input checked="" type="checkbox"/>	LinkedIn	<code>https://www.linkedin.com</code>
<input type="checkbox"/>	Google+	<code>https://plus.google.com</code>
<input type="checkbox"/>	Instagram	<code>https://instagram.com/fnbsa/you</code>
<input checked="" type="checkbox"/>	YouTube	<code>https://www.youtube.com/user/brandfu</code>
<input type="checkbox"/>	Flickr	<code>http://www.flickr.com</code>
<input type="checkbox"/>	Cart	<code>https://www.woolworths.co.za/store/fragment:</code>
<input type="checkbox"/>	Wordpress	<code>http://www.your-domain.com</code>

Icon Style

- Colour
- Colour
- Greyscale
- Greyscale Large

Lastly click *“Save Social Networks”*

Icon Style

Greyscale Large

Save Social Networks

Once saved the icons will appear in the signature



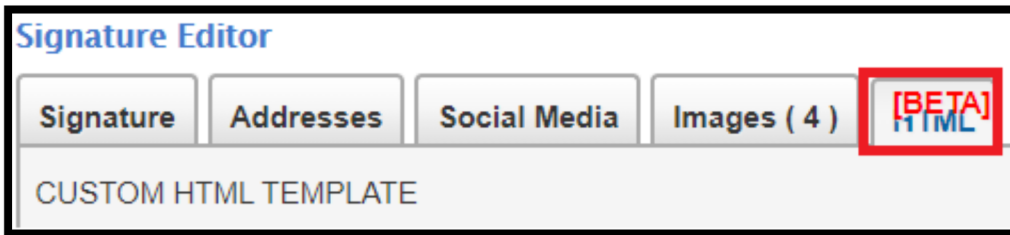


#### 4.1.1.5. HTML Editor

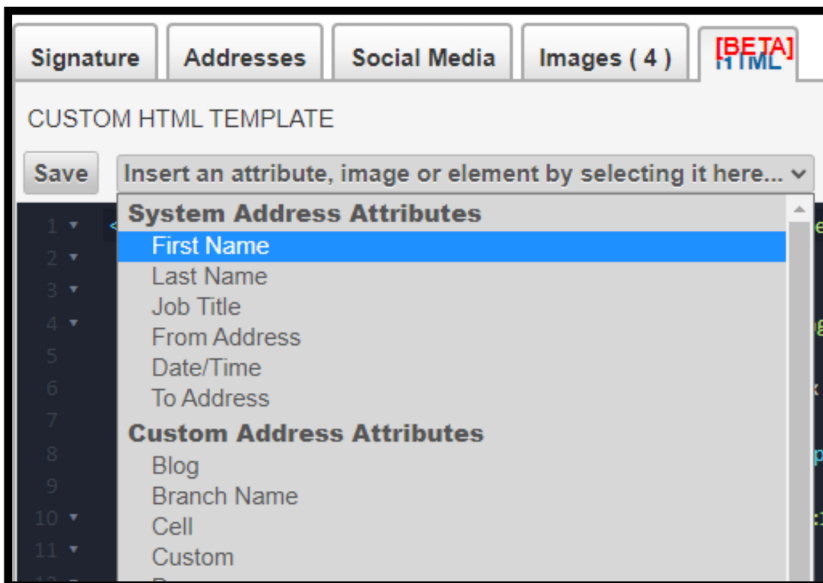
If a user wants to create their own HTML signature, then this will need to be enabled in the settings page by the iMail Staff member.

Settings > User > Would you like to use advanced UI options: Yes

This will open a new tab in the editor section called “BETA HTML”



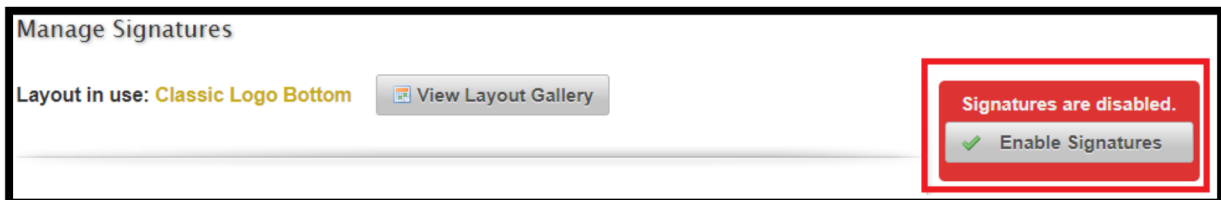
In the HTML editor you will be able to choose specific items you want to edit as per below



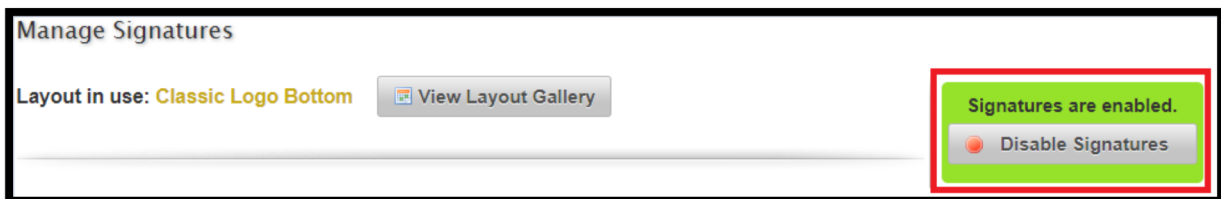
#### 4.1.1.6. Enabling Signatures for Final Testing

Once the client is happy with the signature design, its good practice to go and test it to other mail platforms and mail clients.

You will first need to change the status of the signature being “disabled” to “enabled”, this is done by clicking the red button on the right of the editor

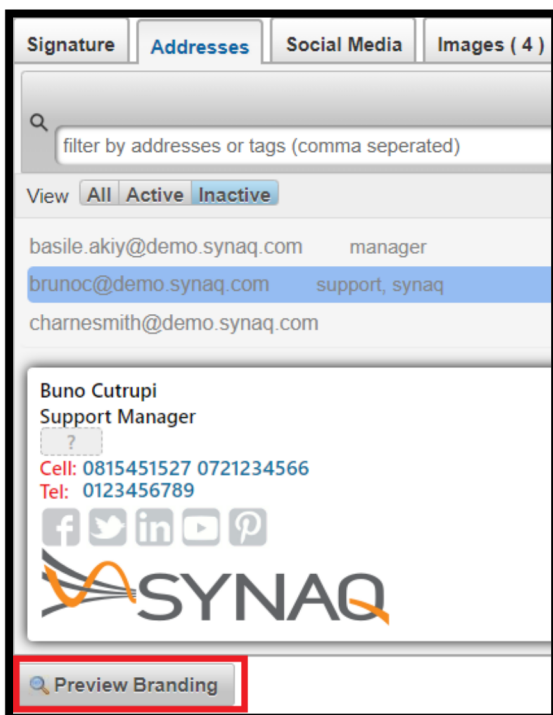


Once you have clicked on “Enable Signatures” it will change to green

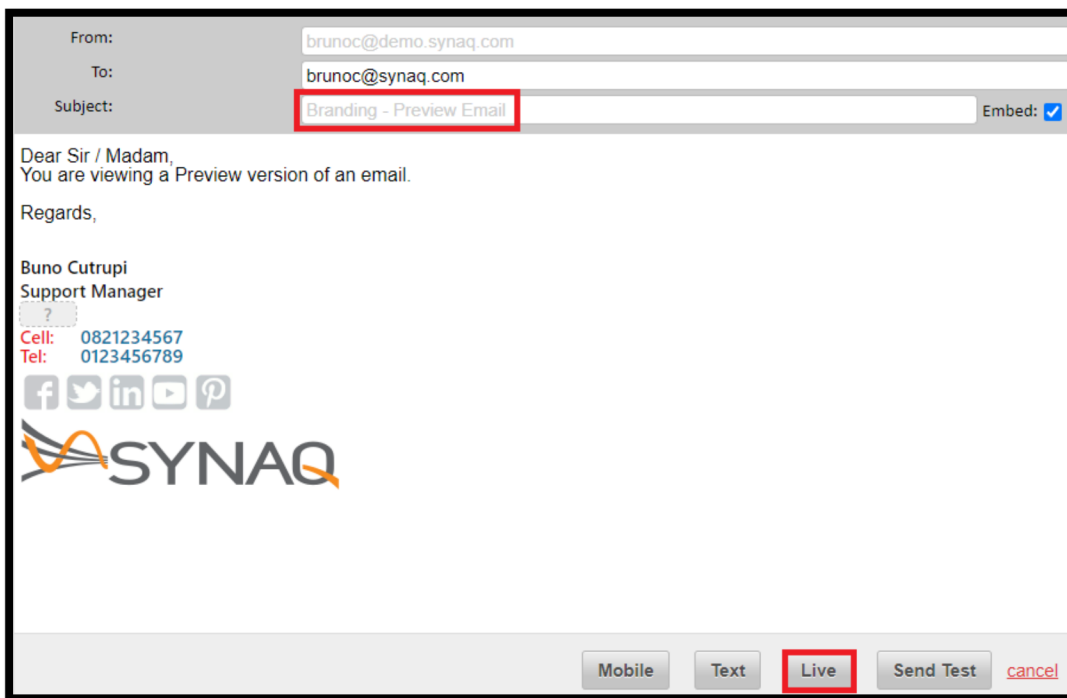


You can now send a test mail using the “LIVE” feature as per below

Signature Editor > Addresses > Choose Mailbox > Preview Branding

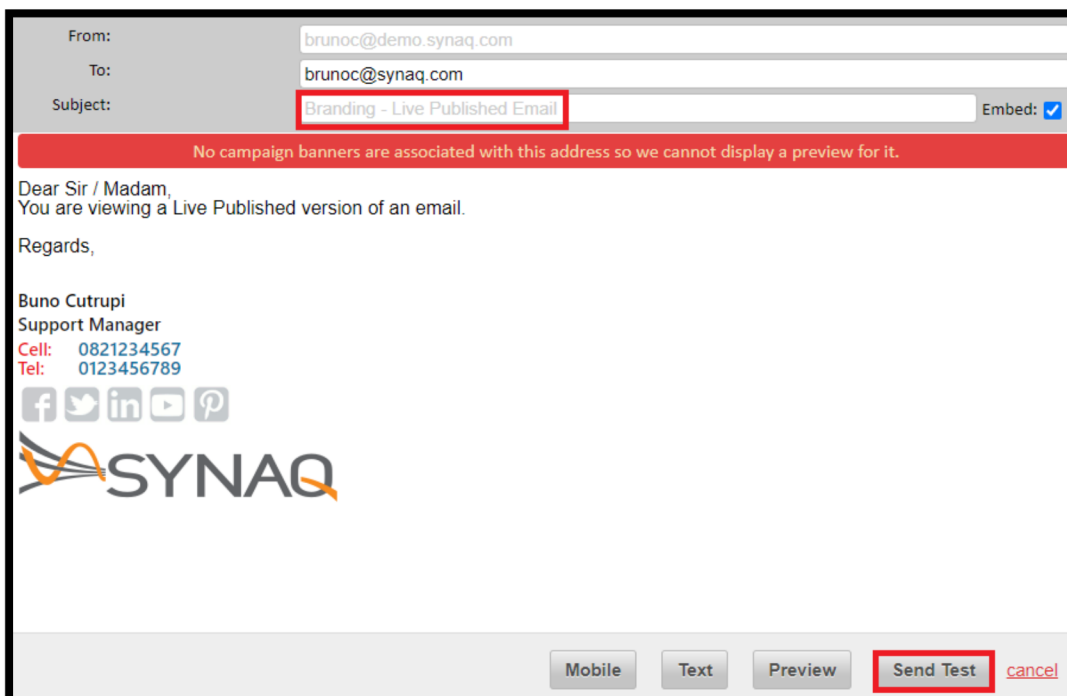


You will see a Pop-up screen where you can send a test mail



You will notice “*Preview Branding*” has been highlighted, as this is an **important** point to advise clients as this is not the live version.

The LIVE version is used to send test mails, and will be done by clicking on the “*LIVE*” button

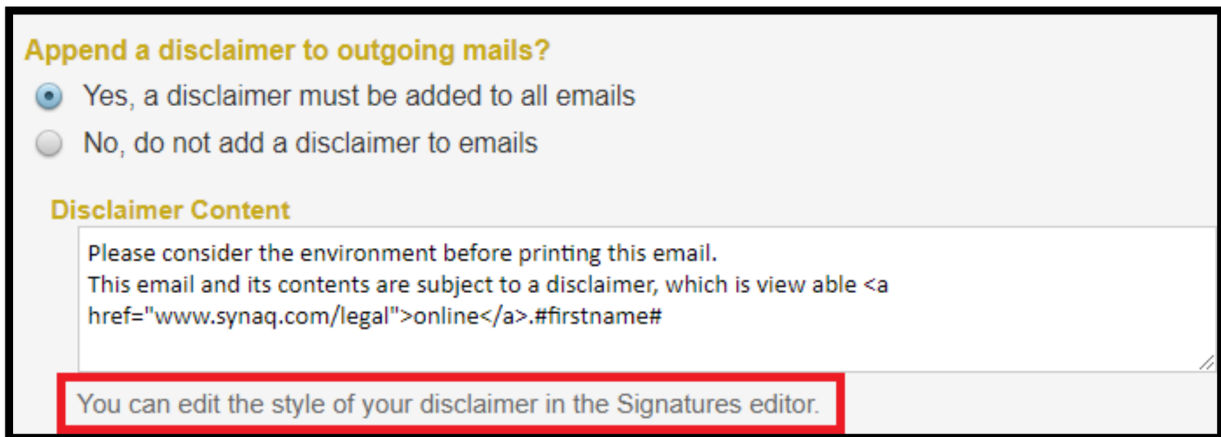


You will notice that the grey question has been removed and can now send a test mail to any address.



#### 4.1.1.7. Adding a Disclaimer

You will need to go to the “Settings” Tab and adjust the following rule to include the disclaimer  
Settings > Signatures > Append a disclaimer to outgoing mails? > Yes, a disclaimer must be added to all emails



**Append a disclaimer to outgoing mails?**

Yes, a disclaimer must be added to all emails

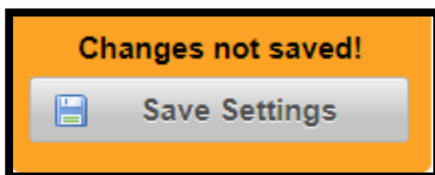
No, do not add a disclaimer to emails

**Disclaimer Content**

Please consider the environment before printing this email.  
This email and its contents are subject to a disclaimer, which is view able <a href="www.synaq.com/legal">online</a>.#firstname#

You can edit the style of your disclaimer in the Signatures editor.

Once you have filled in your disclaimer, to click on the “Save Settings” button that appears to save the configuration.



#### 4.2. Tips and Tricks

The signature editor works a lot around HTML coding. So, you can place HTML coding in different places.

Example: put the line break HTML code “<br>” to put new items in the same category on the same line. Clients can use this to put 2 numbers in the Cell Phone field.





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