

Quick Start Guide:
BingMail Plugin



Quick-start Guide: Using the BingMail plugin operation



Introduction

The BingMail plugin for Visual Dialogue is a great addition to the Visual Dialogue platform that aims to further streamline and automate your communications. It enables the automatic, direct and secure upload of documents to Bing. After finalising the authenticated session, Bing will validate, process, print and lodge your communications for mailing.

This document outlines the steps required to use the plugin. It is intended for users who are already familiar with Visual Dialogue, and just need to understand how to configure the BingMail operations properties window.

All the best with using BingMail! If you need help, log onto our [Service Desk](http://www.sparkcorporateptyltd.atlassian.net/servicedesk/customer/portal/20) and a Spark team member can assist you. (www.sparkcorporateptyltd.atlassian.net/servicedesk/customer/portal/20)

1. Create an RTF letter template

Create and save a new RTF Letter template. This will be the letter template you intend to send to your customer. If you already have one saved, you can just use that.

2. Create a new Metadata template

Address information as well as mailing attributes – i.e. how you would like your letters to be produced and sent – is provided to Bing via a metadata template file.

Spark have already created a generic Metadata template for you, so you will just need to locate it and do a simple 'Save As' to create and edit a new one for each mailing. See sample below:

The screenshot shows a window titled 'Explorer' with a sub-window 'BingMail_MetaData'. The main area is divided into two sections: 'Control parameters' and 'Textual content'. The 'Control parameters' section has a text field with the value 'leave blank. This value is set automatically when the message is sent'. The 'Textual content' section contains a JSON object with the following structure:

```
{
  "duplex": true,
  "colour_model": 1,
  "title": "New Customer Welcome Letter",
  "customer_email": "sjfowler@spark.com.au",
  "confirmation_email": true,
  "department": "CustomerService",
  "terminal": "«#UserName()»",
  "cust_hold": false,
  "orientation": 0,
  "production_options": {
    "aup_dlvtyp": 1,
    "c4_staple": false,
    "force_c4": false,
    "archive": false
  },
  "letters": [
    {
      "postal": [
        «Personal.MemberName»,
        «Personal.AddressLineOne»,
        «Personal.AddressLineTwo»,
        «Personal.AddressLineThree»,
        «Personal.AddressLineFour»
      ]
    }
  ]
}
```

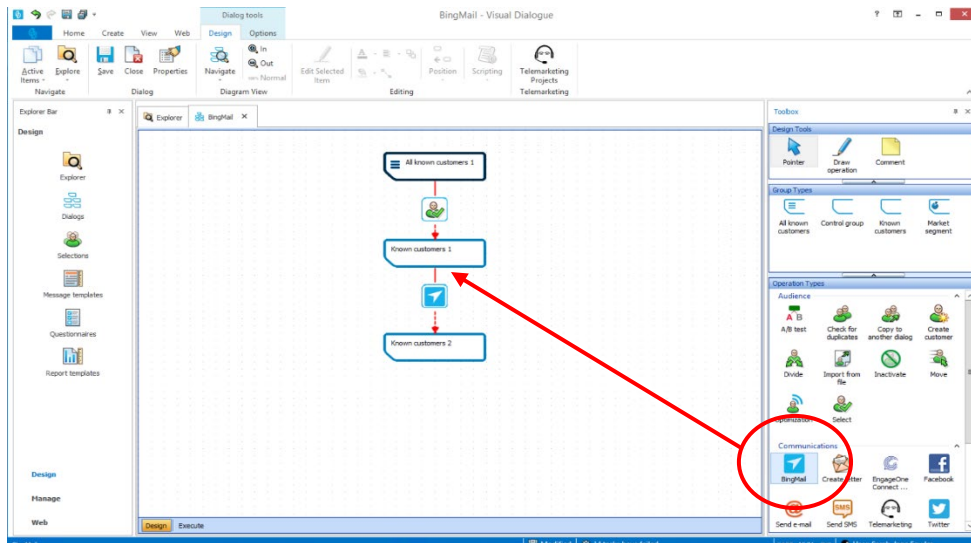
EDITING YOUR METADATA TEMPLATE:

See below for more details on the values within your metadata template. Most times, you may only be updating the “title”.

Name		Notes
duplex		Set to true for double-sided printing
colour_model		0 - mono, 1 - full colour, 2 - first page colour, 3 - first page colour with colour attachments, 4 - mono with colour attachments, 5 - colour with mono attachments.
title		User-friendly name identifying the mailing
customer_email		Email address of the recipient of confirmation emails
confirmation_email		If set to true a confirmation email will be sent to the address specified in customer_email
department		Department name.
terminal		Computer name from which the mailing was sent.
cust_hold		When set to true the pack will remain on hold until you release it from the Bing Customer Portal.
orientation		Orientation of the document pages. Possible values are 0 - orientation will be calculated from page dimensions; 1 – set portrait orientation for all pages; 2 – set landscape orientation for all pages.
production_options		Defines production options that can be applied to a mailing. See details below.
	aup_dlvtyp	Australia Post delivery service type - 0 for priority (default) or 1 for regular.
	force_c4	Set to true to use c4 envelope stock.
	c4_staple	Set to true to always staple c4 letters.
	archive	Set to true to use account archive rules.
postal		An array of strings of postal address lines.

3. Insert the BingMail operation into your dialogue

Drag and drop the operation to the 'from' group within your dialogue. Then click through the pop-ups until your new operation is visible in the dialogue design window.



4. Configure the operation properties window

Double-click on the BingMail operation to open the Operation Properties window.

There are three items you need to update for each mailing.

1. **PDF template** (created in Step 1)
2. **Metadata template** (created in Step 2)
3. **PDF filename** (This is a free-form input field. It's there for you to be able to send Bing any quick reference to the type of mailing you want applied. For example, "Spark letterhead with reply envelope" or "Spark customer 3 letterhead")

Once complete, check the 'is active' checkbox to make the branch active.

Don't forget, you will still need to configure the **Execute options tab (e.g. Waterfall) as you would do with other Visual Dialogue operations.*

