Service Autopilot™

DOCUMENT EDITOR

USER GUIDE

Version 1.1

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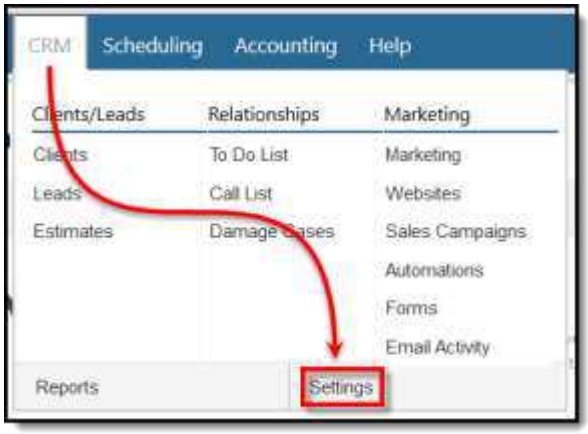
Overview

Service Autopilot's enhanced Document Editor lets you create an array of documents, such as emails, estimates, and marketing material. This tool is available to all Service Autopilot users with a **Pro Membership**.

Access the Document Editor

Access the Document Editor from **CRM > Settings**. Here, you can manage existing documents as well as create new ones.

1. In your SA account, go to: **CRM > Settings**



2. Click **Documents**.

3. Select an active or inactive document and click **Edit**. The **Document Editor** screen will appear.

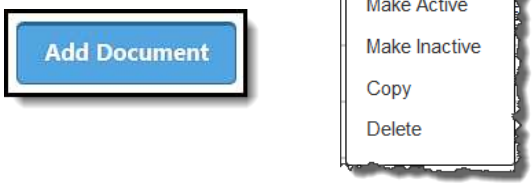
You can quickly identify new documents with this symbol: NEW

Add a New Document

The first step is to add a document to the Document list.

1. Click either the **Actions** button or the **Add Document** button:
   - Hover over the **Actions** button and click the **Add Document** option from the dropdown menu.
   - Alternatively, click the **Add Document** button located on the top-right corner of the **Documents** screen.

   The **Document Settings** overlay will appear.



2. Select a document type from the dropdown.

   You can create six types of documents using the Document Editor:

   - Client Email
   - Marketing Email
   - Estimate
   - Mobile App Email
   - Mobile App Text Message
   - Other

   Depending on the type of document, there might be other documents associated with it to help achieve a specific process within your organization. For example, when creating an Estimate, you also need an **Estimate Email** and **Confirmation Email** – which need to be created previously as individual document types.

3. Type in:
   3.1. Name – This is the name for the document.
   3.2. Description – This is the description for the document.
   3.3. Subject – This will appear in the subject line of an email.
4. Click **Save**. The **Document Editor** screen will appear.

You can print out any of the documents you create using the Document Editor.

Document Editor Screen

The Document Editor lets you manipulate various tools to create custom documents, including the content and rows of documents related to estimates, marketing emails, etc.

Edit a New Document

To start editing a new document, you first must add a new document from the **Documents** screen. Then follow these steps:

1. Add rows to your blank document from the **Rows** tab by dragging and dropping. These are the building blocks that define how your document will look and are required.

2. Now add content from the **Content** tab. You can do this by dragging and dropping a selected tile onto a structure line. Before adding content, you **must have** a defined *structure* (see step one above).

3. Start creating content within the different content tiles. For example, start typing content on a Text block or add an image on an Image block.
4. You can add place holders that will be replaced with task-related info (for example, [company name]). Do this from the **Merge Tags** option when you select a Text window, or by typing in "@" which pops up the merge tags (continue typing to filter out through the available merge tags and click to include in the body of your document).

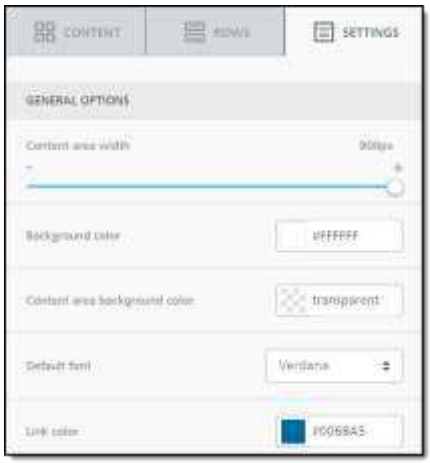
Merge tags function as *personalization fields*. These tags are useful if you want to create a template that you can send to multiple leads or clients.

5. Click **Save**.

Manage Content

The Document Editor lets you manage content in these key areas:

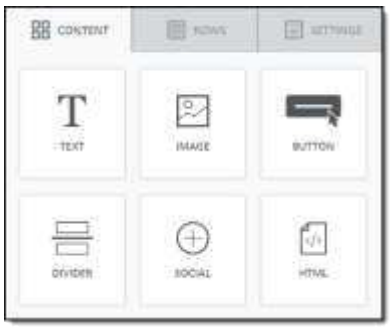
- **Settings** – General settings for the message.



These are inherited by Structure and Content blocks. For example, the font family set in the message settings is then used everywhere in your message, except where you use a custom setting. This section can help you build a coherent message very quickly.

You must add rows to any new document before you can start managing or adding content to it.

- **Content** – This section includes a series of tiles that represent the different kinds of content you can use in your message.



To use these tiles, **drag one inside a column**. This tile will auto-adjust to the column width. Every content block has its own settings, such as granular control on padding.

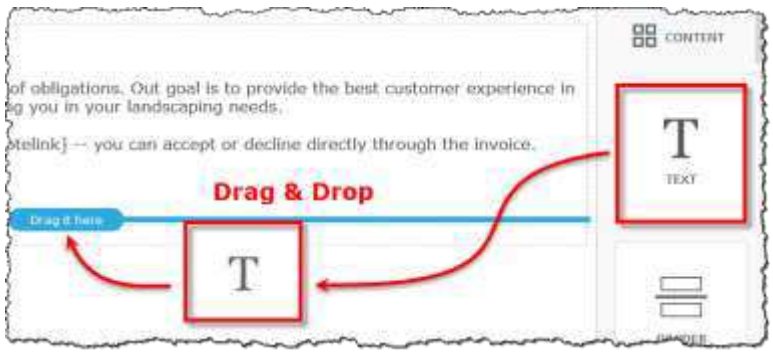
- **Rows** – Here, you will find a list of row types to insert into the message.

These are structural units that define the horizontal composition of a section of the message by using columns. You can use one to four columns. Every row has its own settings.

Using more than one column allows you to place different content elements side by side. You can add as many structural elements you need to your message.

Drag and Drop Content Tiles

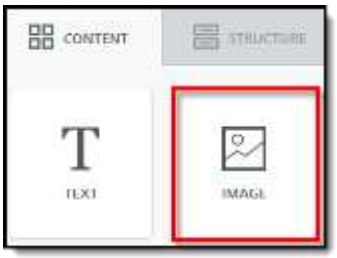
To apply content tiles onto the Document Editor, select a tile from the **Content** tab and drag and drop it into a designated space. Drag the tile until a blue indicator line appears.



Add Images

An important aspect of creating documents using the Document Editor is adding images. You can upload, import, or search for free photos. This section gives a quick overview of how to add an image to your custom document.

1. Drag and drop an **Image** tile from the **Content** tab in your document editor. Before doing so, you must have a body structure set in place.



2. From the **Content** field, click **Browse**.

3. Select one of these from the File manager popup:
   a. **Upload** – Upload cross-company images. You can upload multiple files at a time.
   b. **Import** – Import images from the web and other sources (for example, Facebook and Instagram).
   c. **Search free photos** – Search for free stock photos.

4. After importing or searching for images, double-click on the image from the **Upload** section to insert the image into your document.

Scale Images

You can scale any image up or down depending on its original size. The Document Editor includes a Resize feature which will allow you to accomplish this task. The following steps will walk you through the image scaling process.

1. Click on an image on a document.
2. Click **Edit Image** under: **Content > Content Properties**

3. Select the **Resize** option from the action ribbon on the Photo Editor.

4. Adjust the **Width** or **Height**. The proportions will adjust accordingly while the **Lock Icon** is enabled; this option will maintain image proportions.

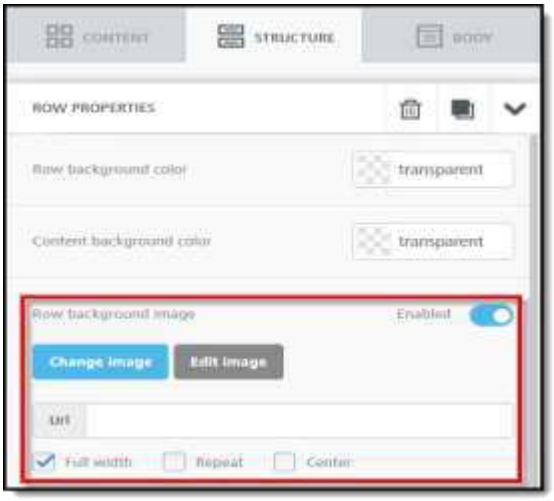
5. Click **Save**.

Background Images

You can add background images to a document by following these steps:

1. Go to: **Rows > Row Properties > Row Background Image**
2. Click the toggle button to **enable** background images.
3. **Upload** an image in a similar way to adding any other type of image onto the document.

Once uploaded, the image will appear in the background of the document.

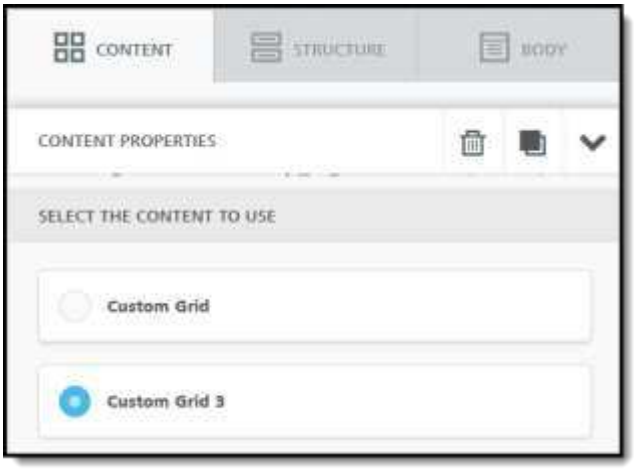


Background images are not compatible with all email programs. When they are not supported, the row background color will be used instead. So, make sure that the color works well with your content.

Dynamic Content

Adding a Dynamic Content tile to your document will play an important role when creating estimates. This option lets you attach a Custom Grid to your document, which is created as a separate function in Service Autopilot. The process for adding Dynamic Content to your document is like other content tiles – drag and drop.

After adding **Dynamic Content** to a document, you can select the content to use. Here, you will find a list of grids and tables created as a separate function in Service Autopilot.



This content type is only available when creating an **Estimate** Document Type.

Preview

You can **Preview** documents in Desktop or Mobile format while using the Document Editor in Service Autopilot. These options give you a visual reference of how your document will appear to clients. This option is on the top-left of the menu ribbon.

Click either **Desktop** or **Mobile** to change the preview mode.

Edit Existing Documents

In Service Autopilot, you can edit documents that were created in the Document Editor. The process for editing existing documents is like creating new ones – by accessing them through the **Documents** screen.

1. Go to the Documents screen (**CRM > Settings > Documents**).
2. Click the existing document to modify.
3. Click the **Edit** button on the bottom-right corner of the **Document Settings** overlay.

4. Once the Document Editor appears, you can modify its contents.
5. Click the **Save** button in the top-right corner of the editor.

Undo and Changes History

You can rewind or fast-forward to any point in the recent edit history. An icon displays in the bottom left corner of the screen after changes are made to a document.

The icon is composed of three action buttons:

- **Undo and redo arrows** allow you to navigate back and forth between changes

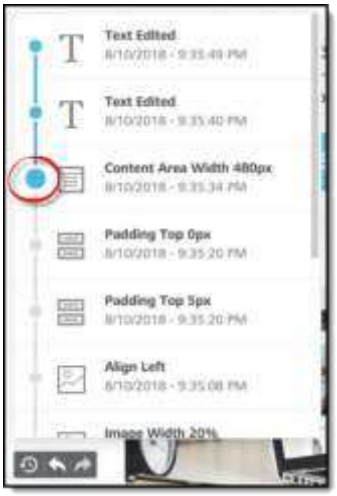
- **History icon** expands a timeline that includes the latest 15 changes


Timeline

A history timeline allows you to browse through the most recent changes. Each change instance is composed of three components:

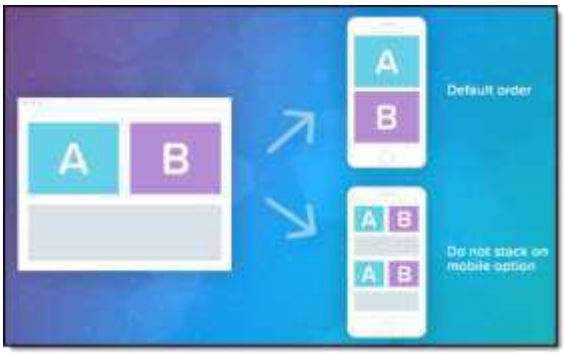
- An element type icon (an image, text, etc.)
- A description of what changed
- A timestamp

When you select a previous step from the timeline, the history record displays as the selected item. The more recent changes are still available, allowing you to move forward without losing any changes. Click on the **Message Opened** history record to go back to the original copy.



Modify Default Column Stacking

By default, the Document Editor modifies content to be “stacked” when displayed on mobile devices. This guarantees a better experience while reading emails or other documents on mobile devices. On some instances, this may affect the original design, leading to excess empty space or important elements of the message being hidden.



You can modify this default setting to prevent from content to be “stacked” automatically. Follow these steps:

1. Follow steps 1-3 on the Editing Existing Documents section on this user guide.
2. Click on a pane’s **Row Properties** and enable the **Do not stack on mobile** option.
3. Click the **Save** button on the top-right corner of the editor.

Modify Height of Transparent Divider

This option lets you use a single divider to better control empty spaces within a message's design.

Follow these steps to modify the divider:

1. Follow steps 1-3 on the Editing Existing Documents section on this user guide.
2. Drag and drop a **Divider** tile under the Content tab.

3. Click the divider to access its **Content Properties**.
4. Click the **Transparent** toggle button to enable, it will turn blue.

5. Click the **plus** or **minus** buttons to modify the divider's spacing.

6. Click the **Save** button at the top-right corner of the editor. A popup message will indicate that the document has been saved.

Hide Content on Mobile

Follow these steps to hide unnecessary design or content elements on mobile devices.

1. Follow steps 1-3 on the Editing Existing Documents section on this user guide.
2. Identify and click a design or content element on your document to access its **Content Properties**.
3. Click the toggle button to enable the "Hide on mobile" option under **Block Options**. This will hide the document's element when viewed through a mobile device.