

## Designing in the FastTrack

The Fast Track is best used with templates that have already been customized as desired. For more information on the differences between the FastTrack and the Advanced Designer, click [here](#).

Once logged in, you will land on the following home screen-- step # 1 of the FastTrack:

### 1. Select Case

The screenshot shows the 'FAST TRACK' interface. At the top, there is a logo 'Make It! Personal v2' and a 'Menu' button. Below the logo is a progress bar with four steps: '1. Select Case', '2. Select Product', '3. Review Design', and '4. Make It!'. The '1. Select Case' step is currently active. On the left side, there are three buttons: 'ENTER NEW CASE' (with a checkmark), 'FILL FROM A PAST CASE', and 'IMPORT FROM MANAGEMENT SOFTWARE'. On the right side, there are four input fields: 'First Name', 'Last Name', 'Date Born', and 'Date Died'. Each date field has a calendar icon. At the bottom, there is a 'Save Case and Select a Product' button. The footer of the page reads '© 2017 Messenger. All Rights Reserved'.

**Enter New Case** – Enter a first and last name, and the date born/date died. **Click *Save Case and Select a Product***.

**Fill From a Past Case** – Retrieves a previously saved Case to begin designing a new stationery product.

**Import From Management Software** – Imports Case Data in XML format from popular Management Software applications. Simply choose a Funeral Home location to be associated with the new case, and then click **Select File** to browse to the XML file output from your Management Software. Click **Import Case and Select a Product** to save a new Case with the imported information.

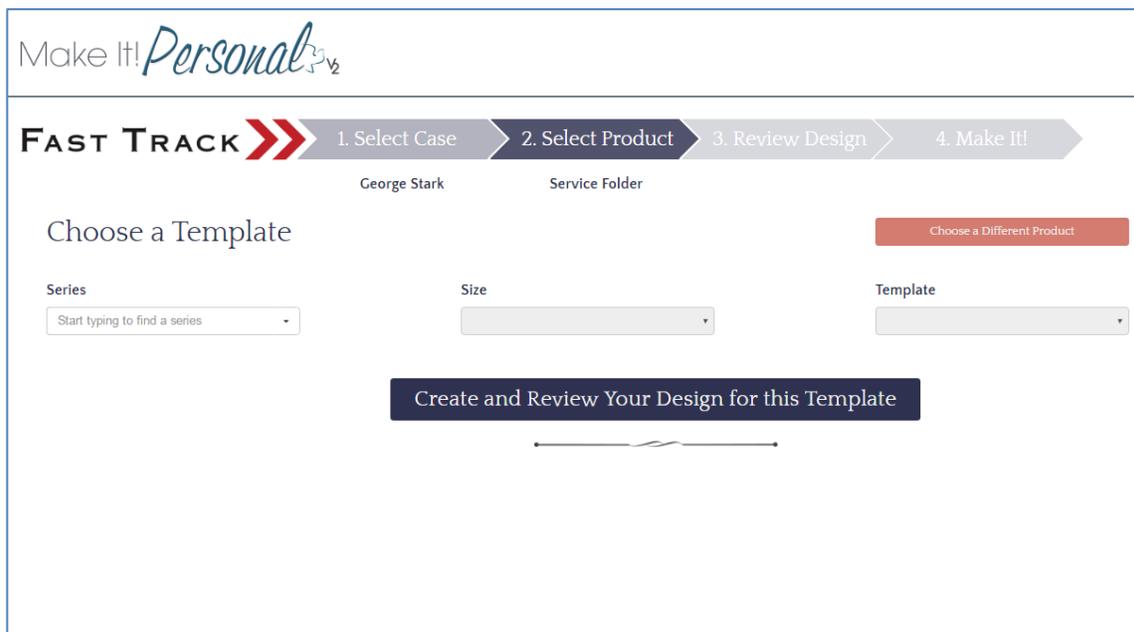
#### Menu –

- Create New Design
- View Ordered Photobooks
- Manage Case Info
- Manage Design Tools
- Location Info & Settings
- Help
- Logout

## 2. Select Product



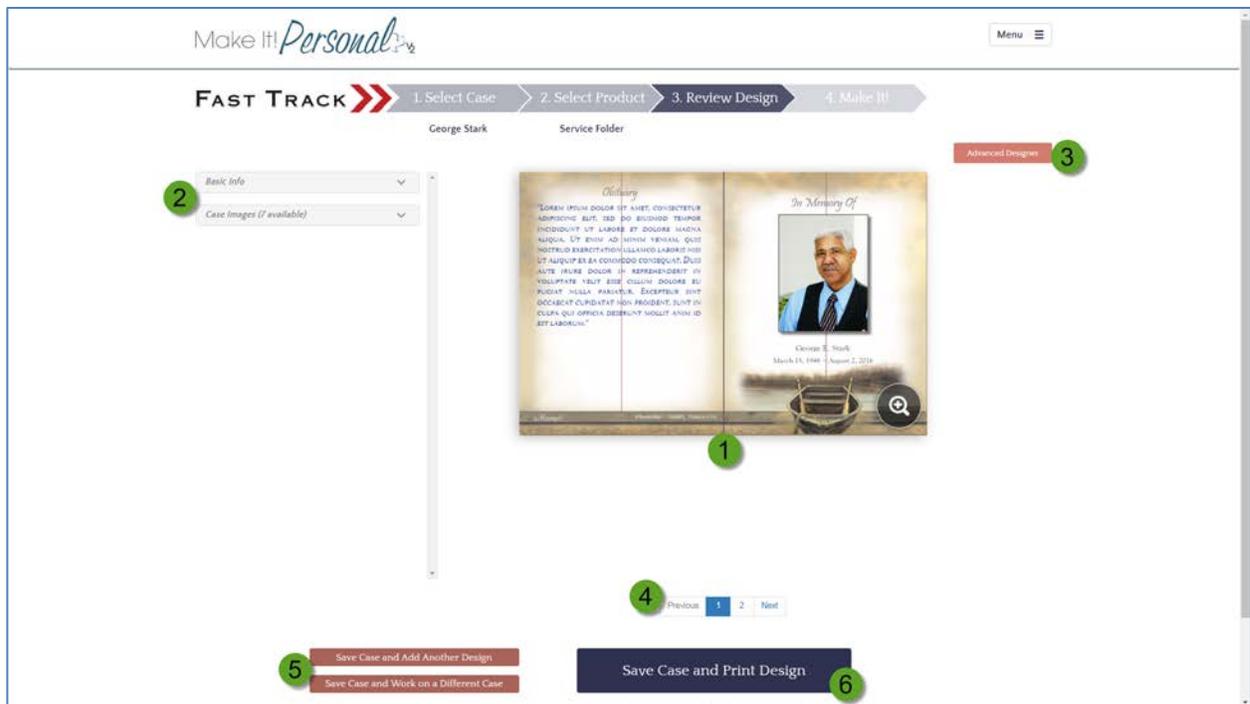
If any stationery designs have already been saved for this case, you will see them listed in the topmost section – **Existing Product Designs**. Clicking on any of these icons will load the previously saved design. Clicking on any of the product icons under **All available Messenger products for Personalization** will start a NEW design for the chosen case. If starting a new design, the next step is to choose a **Series** (theme), **Product Size**, and **Template**



If needed, you can click **Choose a Different Product** to go back and select a different product type to be personalized. Click **Create and Review Your Design for this Template** to proceed to step #3.

## 3. Review Design

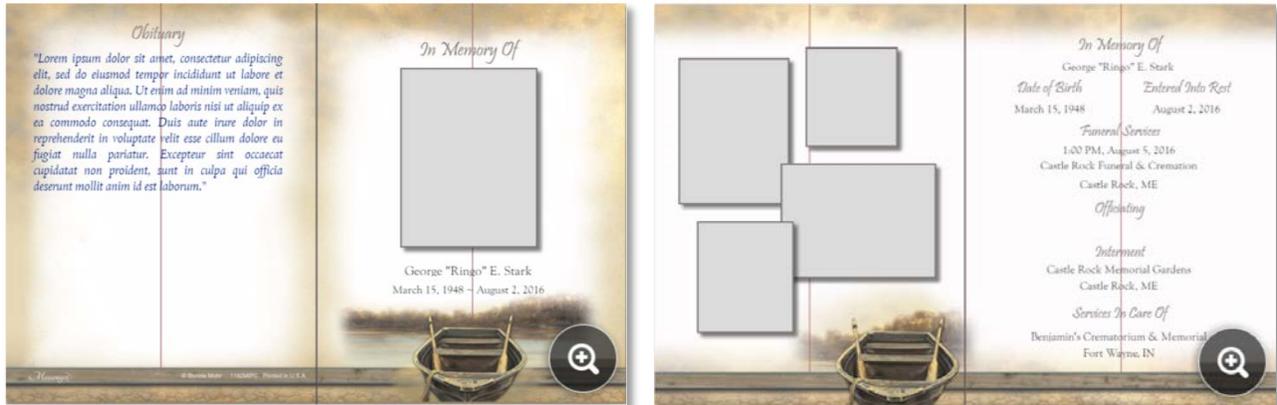
This is the step where you'll make any changes to the layout as needed; remember the FastTrack can make only basic changes to the fields already present in the template. Adding new fields or extensive customization is to be done in the Advanced Designer. Switching back and forth between modes is as easy as clicking a button. (hint: #3 below!)



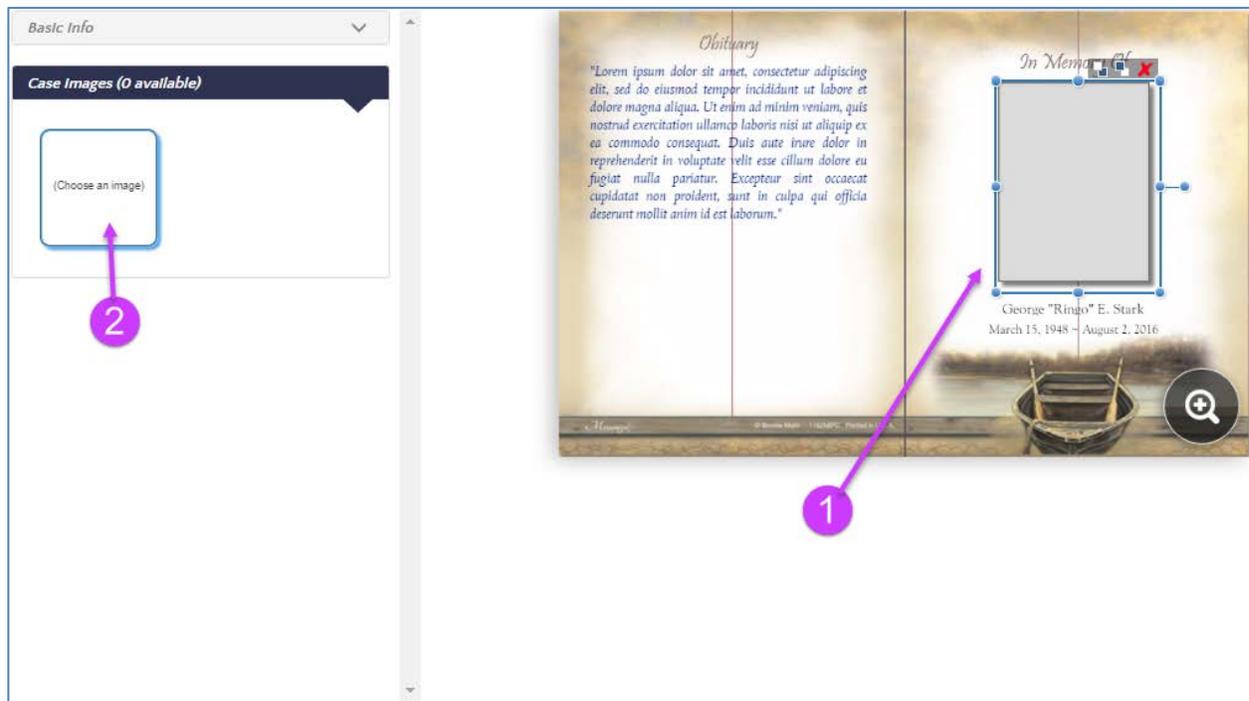
1. **Canvas area** – displays your design panel in real-time
2. **Case Fields**– Where you make changes to case information
3. **Advanced Designer** – click here to switch over and edit the design in the Advanced Designer. You'll be asked if you want to save changes each time you change modes.
4. **Panel Navigation** – changes which panel is being viewed/edited. The system automatically saves any changes each time you switch panels
5. **Save Case & Add Another Design/Work on a Different Case** – Saves case AND design in its current state, and begins a new Case or Design
6. **Save Case and Print Design** – Saves case AND design in its current state, and proceeds to step #4

## Uploading & Editing Images

If you are creating a design in the Fast Track, and are starting with a new case, you will want to upload some images.



The gray boxes above are **photo placeholders**. Simply click one to automatically expand the Case Images section on the left. Click on the blank tile that is highlighted in blue.



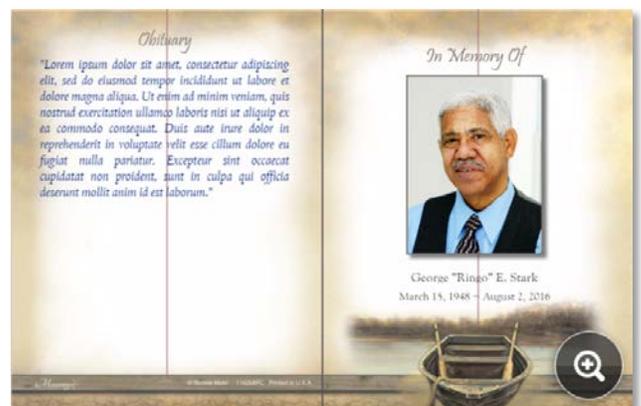
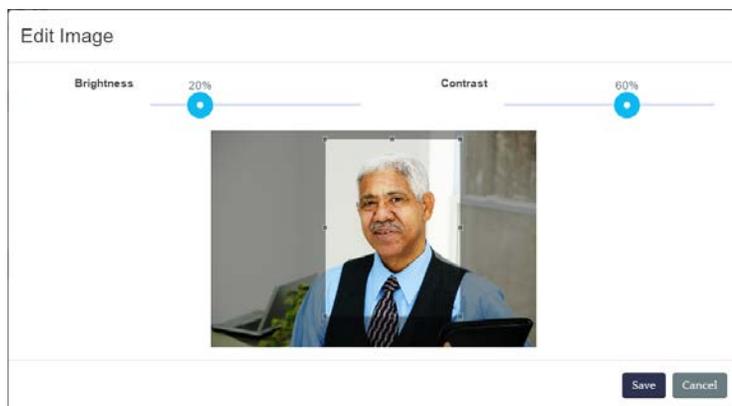
Next, a pop-up will open where you can both upload photos, and select from those photos which one to populate the placeholder. Click **Upload New Images** to browse for the photos to be uploaded. You can upload multiple images at once.



Don't forget, you will still need to click on an image to select it (blue highlight), before clicking **Save**. The image will then display in the placeholder. You can change the image as many times as you like by clicking on the image thumbnail tile in the case fields area on the left.

## Cropping and Brightness/Contrast

Editing the properties of an image is quite simple. Click the **pencil icon** just above the selected picture. In this window you can adjust the cropping of the photo, as well as brightness and contrast. Click **Save** when done.



## Elements on a panel

Any element (text or photos... anything that is “selectable”) can be moved and/or resized using familiar drag-and-drop techniques-- Simply mouse over the desired element, and click-hold and drag to move the element. To resize, click on the desired element, then mouse over one of the resizing handles (blue dots) and click-hold and drag to enlarge or shrink the element.

Notice how when any element on a panel is selected, the corresponding data entry field on the left side is highlighted, it's containing section expanded as needed.

Note that when selecting combination fields (Born-Died, Full Name, City-State...etc.) the corresponding combined field is highlighted, but changes must be made in the individual fields:

Example:

Basic Info

Full Name

Title

First Name

Middle Name

Last Name

Suffix

Nickname

Date Born

Date Died

Born ~ Died

Obituary

Font

"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."

Obituary

In Memory Of

George E. Stark

March 15, 1948 ~ August 2, 2016

edit individual fields, NOT the Full Name field

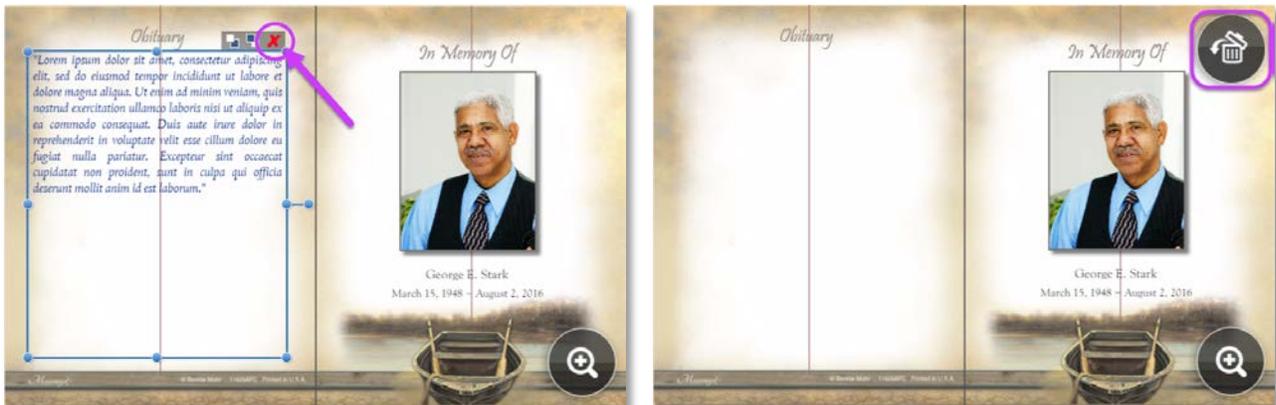
Previous 1 2 Next

## Editing Case Fields

Remember, the Fast Track is *template-driven*; meaning editing of certain elements is limited, as it's intended to be used with templates that already have their styling and layout defined as desired. One example would be that you can only change the font size/style of Obituaries and Verses. Having said that, anything you cannot do in FastTrack, you *can* do by switching to the Advanced Designer.

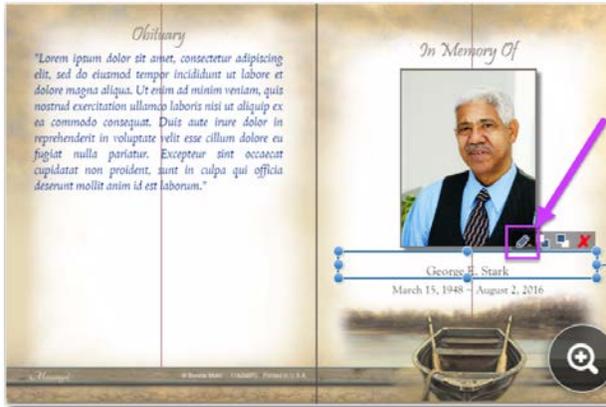
## Deleting Elements

Deleting any unwanted element from a panel is quite simple. Simply select the element and click on the red "X" in the upper right corner of the element; or with the element selected, press the **Delete** key on your keyboard. Immediately, you will see a trashcan icon appear in the upper right of the panel. This will restore the deleted item. You can "undelete" or restore elements until all items have been restored, or until navigating to another panel.



## Name Format

Make It Personal v2 has introduced a new field to accommodate the use of a nickname. As well, we have made it quick and easy to affect the placement of the nickname within the full name. Select the name field on the panel and click the **pencil icon** in the upper right corner. This will open a pop-up that will allow you to choose the position of the nickname.



### Edit Full Name Format

Nickname Placement:

Preview: George "Ringo" E. Stark

## Date Format & Culture

In Make It Personal v2, the Date Format/Culture selector has moved, and is now editable by clicking the **pencil icon** on the top edge of any date field. This will open a pop-up that will allow you to choose from a variety of date styles, and either English or Spanish.

### Edit Date Format / Culture

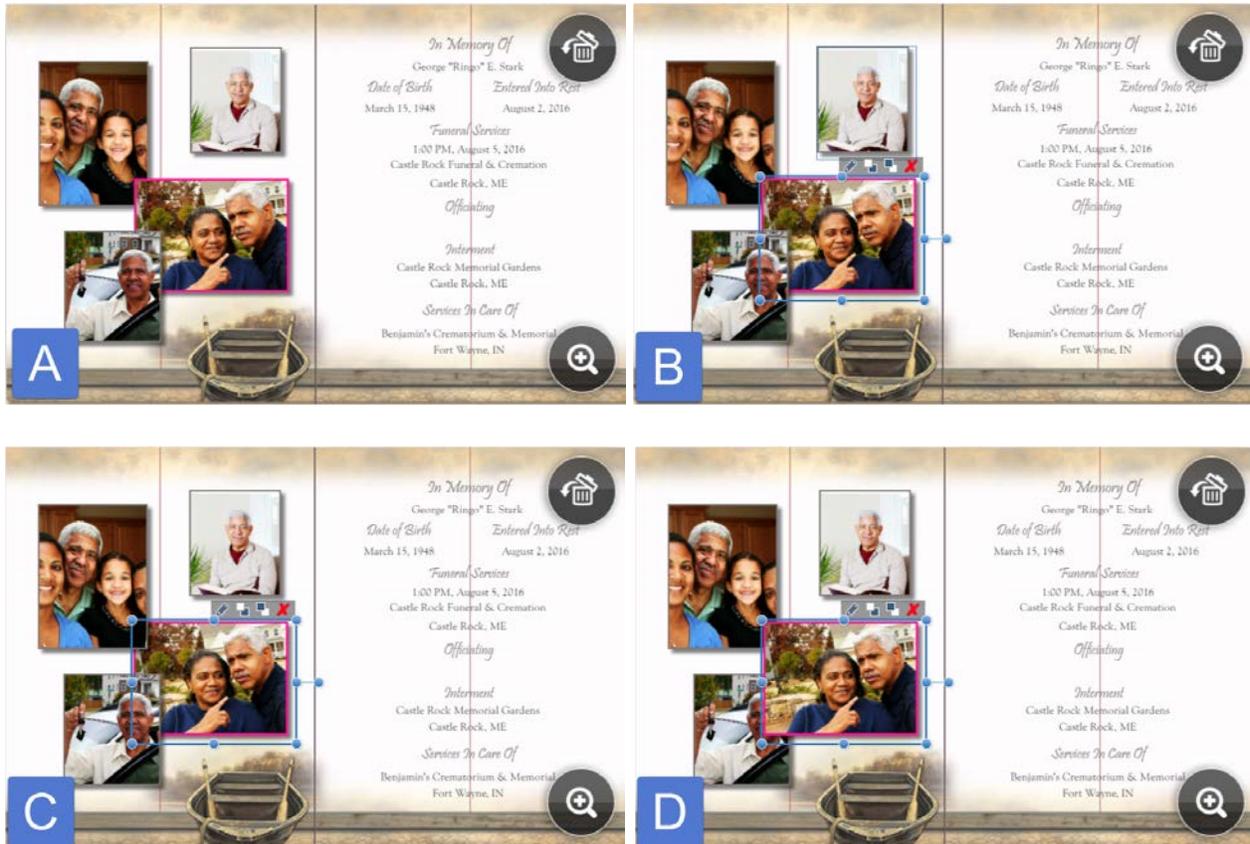
Date Format:

Date Culture:

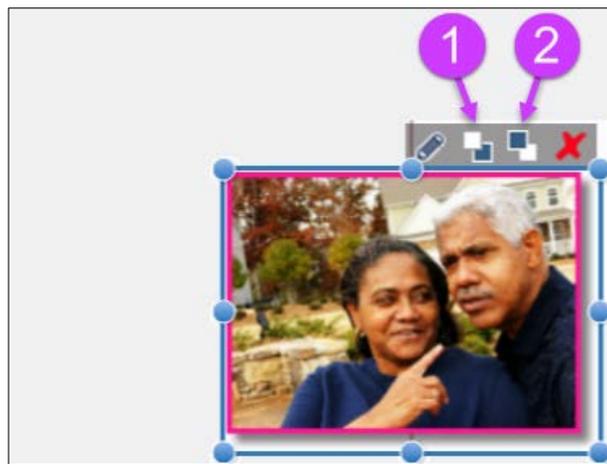
## Layers & Layering

Any element on a panel can be in front of, or behind any other element. The **Send to Back** and **Send to Front** buttons allow you to alter the order of the layering. In the example below we use these buttons to change the layering of the photo with the pink border.

A. Original collage layout. B. Photo is selected. C. Send to Back D. Send to Front



1. Send to Back 2. Send to Front



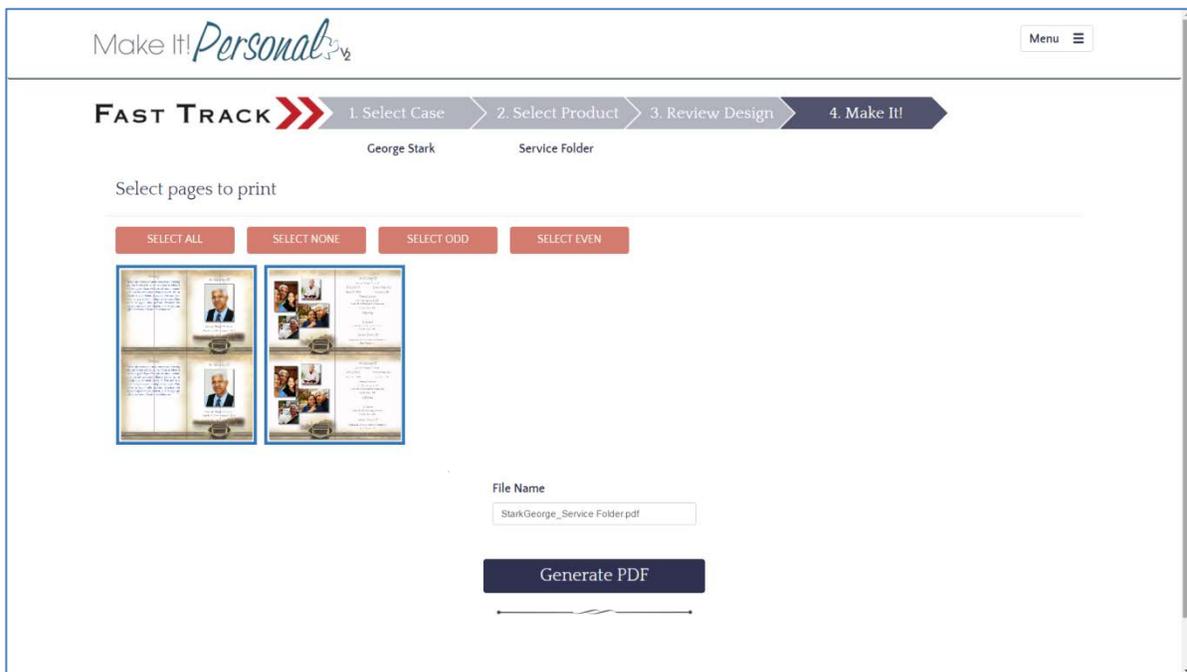
## Saving & Auto Save

Saving in Make It Personal v2 is much more automated, and far less intrusive- prompting you only when absolutely necessary. Notes below on saving in the context of the Fast Track.

- When entering a Name and Born/Died dates on step #1 (Select Case), clicking **Save Case and Select a Product** to advance to step #2- saves a minimal Case Profile to your account
- Once you have selected a Product/Series/Size/Template and are on step #3# (Review Design)- a design will have been saved to that Case Profile
- While on step #3 (Review Design), any time you navigate to another panel all changes are automatically saved
- While on step #3 (Review Design), three buttons available near the bottom of the screen:
  - **Save Case and Add Another Design**
  - **Save Case and Work on a Different Case**
  - **Save Case and Print Design**

## 4. Make It!

In this final step of the Fast Track, we need only to choose which panels to include in the PDF file to be generated. You can use the buttons to select all, none, odd, or even numbered panels. Alternately, you can click on any panel to toggle its inclusion. Only panels outlined in blue will be generated.



Another great improvement to Make It Personal in version 2 is the PDF file to be generated will have the name of the decedent and the product name as the PDF filename. Also, you are able to edit this to give it any name you wish.



The image shows a user interface for generating a PDF. At the top, the text "File Name" is displayed. Below it is a text input field containing the text "StarkGeorge\_Service Folder.pdf". Below the input field is a large, dark blue button with the text "Generate PDF" in white. Below the button is a horizontal line with a wavy center and dots at both ends.

The PDF will now render and download to your PC, and should open in your system's default PDF viewer. At the Print Dialog screen, make sure to select **Actual Size** or **No Scaling**.

Information on setting up Custom Page sizes:

[For PC/Windows](#)

[For Mac](#)

For more information regarding the Portable Document Format:

<https://acrobat.adobe.com/us/en/why-adobe/about-adobe-pdf.html>

[https://en.wikipedia.org/wiki/Portable\\_Document\\_Format](https://en.wikipedia.org/wiki/Portable_Document_Format)