# Managing Design Tools

One of Make It Personal's many great strengths is its open ended ability to customize content within your account to suit your needs. Beyond the individual designs themselves, you have complete control over customizing the "building blocks" that produce these personalized stationery products. These "building blocks" can be divided into three components: Templates, Text Items, and Design Elements. These components can be managed and maintained in the **Manage Design Tools** screen.

You can manage your **Templates, Text Items**, and **Design Elements** from anywhere in the program by clicking the **Menu** button in the upper right of the screen, and choosing **Manage Design Tools**.
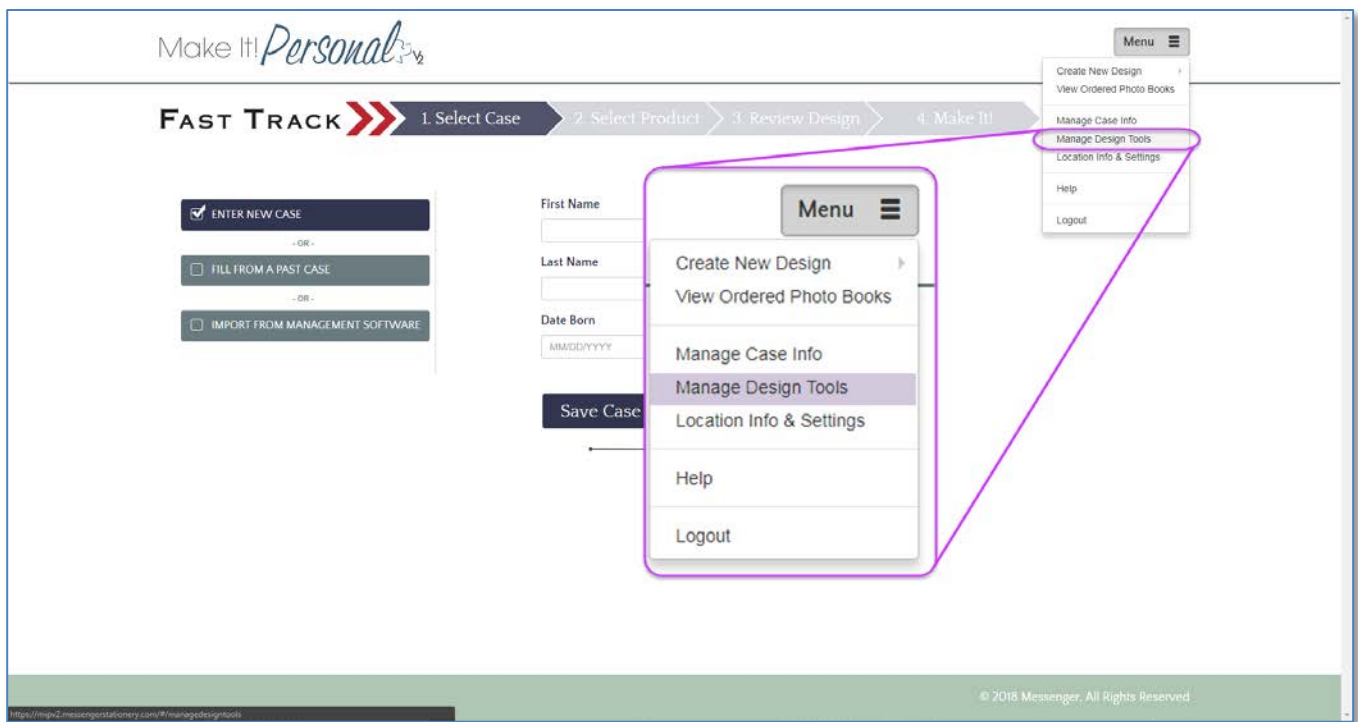
Before we address the creation and maintenance of custom templates, it's very important to understand which user logins have access to make changes, and why...

How user permissions affect templates

MIP2 has introduced a new layer of template permissions to help funeral homes who use custom templates to avoid having their staff accidentally change/overwrite the layouts of their perfected custom templates.

A funeral home custom template is created by either saving as such in the Advanced Designer, or by copying an existing template in Manage Design Tools. The user login this is done under determines whether this is created as an **Our Template**, or a **My Template.** If logged in under the admin login, saved/copied custom templates will be *"Our Templates."* If logged in under any sub-user login, saved/copied custom templates will be *"My Templates."* **Messenger** templates are a standard set of templates professionally designed by our graphic artists, and serve as a starting point from which to spin-off any of your custom funeral home templates.

## Understanding User Logins & Permissions

<u>Admin</u> – This is the login that is created when a customer first registers for a MIP account. This account has full privileges within the system, with the ability to add, delete, and edit all other user logins associated with this account. As well, this login has full permission to add, delete or modify any custom templates saved to the account.

<u>Sub-user</u> – These are the additional user logins that can be added by the admin user for the account. These accounts cannot add, delete, or modify any other user logins on the account. As well, sub-users can only save/overwrite custom templates in the "My Templates" (user-level) category, and cannot overwrite custom templates in the "Our Templates" (Funeral Home level) category.

For more info regarding user account management, click <u>here.</u>

The Manage Design Tools screen:
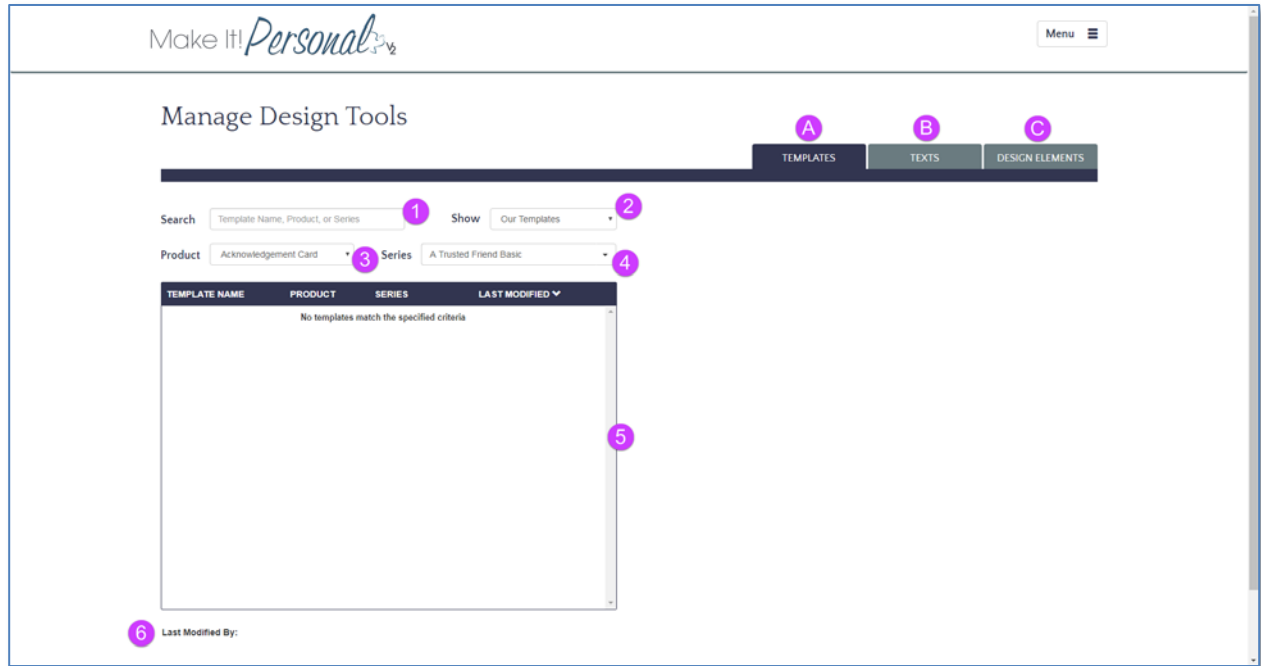
The Manage Design Tools Screen is divided into three tabbed sections which controls their respective items:

A. Templates Tab
B. Texts Tab
C. Design Elements

Templates tab

When you first arrive in the Manage Design Tools screen, you will start out on the **Templates** tab.

Set one or more filters to begin populating the list with template names.

1. Search Filter	Filters template list based on matching 2 or more characters typed into this field
2. Show filter (permissions)	Filters template list to display Messenger templates, or funeral home custom templates (My/Our), or both (ALL)
3. Product filter	Filters template list based the on type of stationery product
4. Series filter	Filters template list based on the stationery preprinted theme art. You can type into this field to search a series name
5. Template list	Populates with a list of templates based on the filters criteria
6. Last Modified By	Displays the username of the last person who made changes to the selected template

Now that we have set some filters, some templates appear in the template list. In this example, we have chosen: *Register book – Mt. Rainer MIP – Our Templates*. The button to the right with the gear icon gives us four operations we can perform on the selected template.

Search	Template Name, Product, or Series		Show	Our Templates ▼
Product	Register Book ▼	Series	Mt. Rainier MIP ▼	

TEMPLATE NAME	PRODUCT	SERIES	LAST MODIFIED ∨
Ben's Custom Book	Register Book	Mt. Rainier MIP	03/01/2018 1:33 PM ⚙ ▼

Edit Template Design
Edit Template Info
Copy Template
Delete Template

1. Edit Template Design

This first option opens the selected template in the **Template Editor**. The Template Editor is basically just the Advanced Designer, but with no decedent case involved. Where you would normally see fields populated with case names, dates, and other specific information, you have the names of the fields themselves. With the exception of the photos, this, in effect, is essentially the same as having the *Field Names* checkbox enabled. Image Placeholders will appear as light grey squares, rectangles, or ovals, labeled either **Default Image** or **Additional Image**.

This section will highlight the few ways the Template Editor differs from the Advanced Designer. [Click here for comprehensive information on how the Advanced Designer functions.](#)
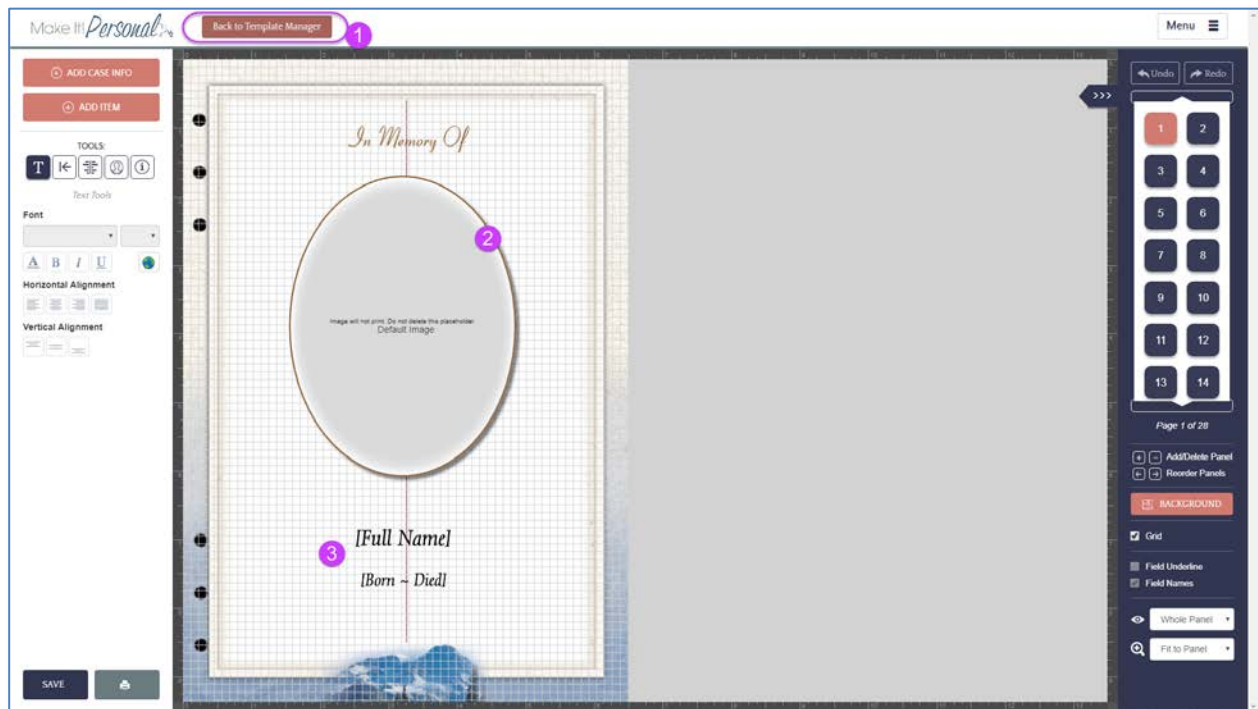
1. **Back to Template Manager–** Exits the Template Editor and returns to the Manage Design Tools screen > Templates tab.

2. **Image Placeholder** – Determines the position, shape and styling of images that populate this placeholder when opened via a case.

3. **Case Info Fields** – Determines the position, shape and styling of Case Info text that populates this placeholder when opened via a case.

When you navigate to **Add Case Info** to drop a new *Case Info Field*, note that the actual information forms are absent, but the *Field Labels* still remain. You can drop these fields onto your panel just as you normally would, by clicking on or near the name of the Field Label.

If you navigate to *Add Case Info > Case Images*, you will see that the process of dropping an Image Placeholder follows suit with the way Case Info Fields are added. Rather than seeing the uploaded images for a particular case, you will notice two "tiles" labelled **Default Image** and **Additional Image**. Clicking on either of these will drop its respective image placeholder onto the panel. Once added, you can move, resize, and style (border, shape, drop shadow, etc.) as desired.
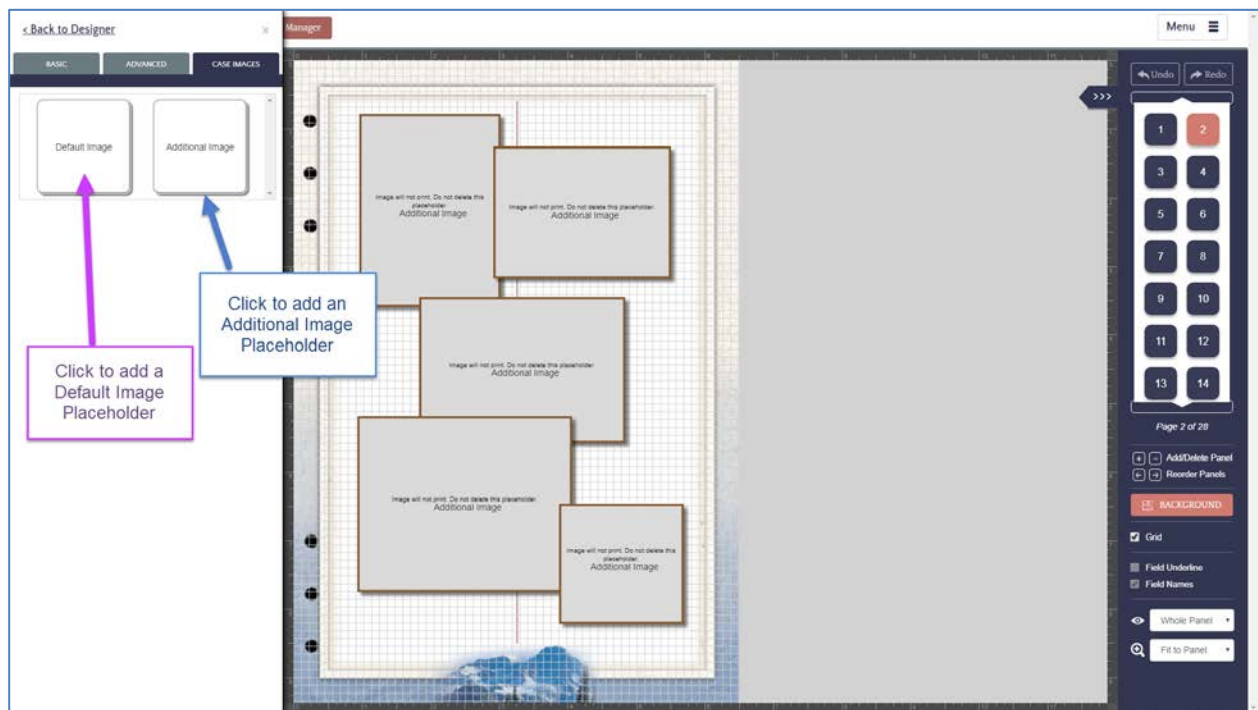
Default vs. Additional Images

In Make It Personal, uploaded images are designated as either a **Default Image** (1 per case), or an **Additional Image** (all the rest). This has to do with how images populate image placeholders in a template. Simply put, the Default Image populates the Default Image placeholder, and the rest of the images populate the Additional Image placeholders in sequence. In register book templates, the first image, or cover photo is a Default placeholder, and the remaining are Additional Image placeholders. In products typically only utilizing a single photo, those placeholders will be the Default Image type. This basically ensures that the primary photo, usually a formal portrait of the decedent, populates correctly in those single image designs, and on the first page of the register book. Keep in mind you can add as many Default Image Placeholders as you want throughout your template.

2. Edit Template Info

The second option under the gear button allows you to change the name of the selected template. Simply make your desired changes to the name in the Template Name field that appears below the Template List. Click the *Update* button to submit the change.

3. Copy Template

The third option under the gear button lets you take the entire layout of the selected template, and copies it to a new template with a new template name. The **Copy Template** pop-up will allow you to input a name, and choose a target series and size to copy to. Ideally, you would copy to the same size product, but it is possible to copy to a different size format. In these instances you will have to adjust the positioning of the fields in the new template, as it does not automatically center/align them.

It is crucial to understand that the resulting new template will have its styling (backgrounds, fonts/font colors/font sizes) determined by the TARGET series' defaults, and not the styling of the source template being copied. For example, if I copy my Mt. Rainier MIP book template, and choose Autumn Harvest MIP as my new series, the fonts, etc. will be the defaults from Autumn Harvest MIP, NOT Mt. Rainier.

Hint: This is where the [Global Font Control](#) tool can be very useful (pg. 7)...


4. Delete Template

This final option under the gear button does just what its name implies; it permanently removes the selected template from the system. Don't fret, like any good deletion operation, you will be prompted for confirmation.

Texts tab

The Texts tab of Manage Design Tools is where you can add, view and manage custom texts saved to your MIP account.
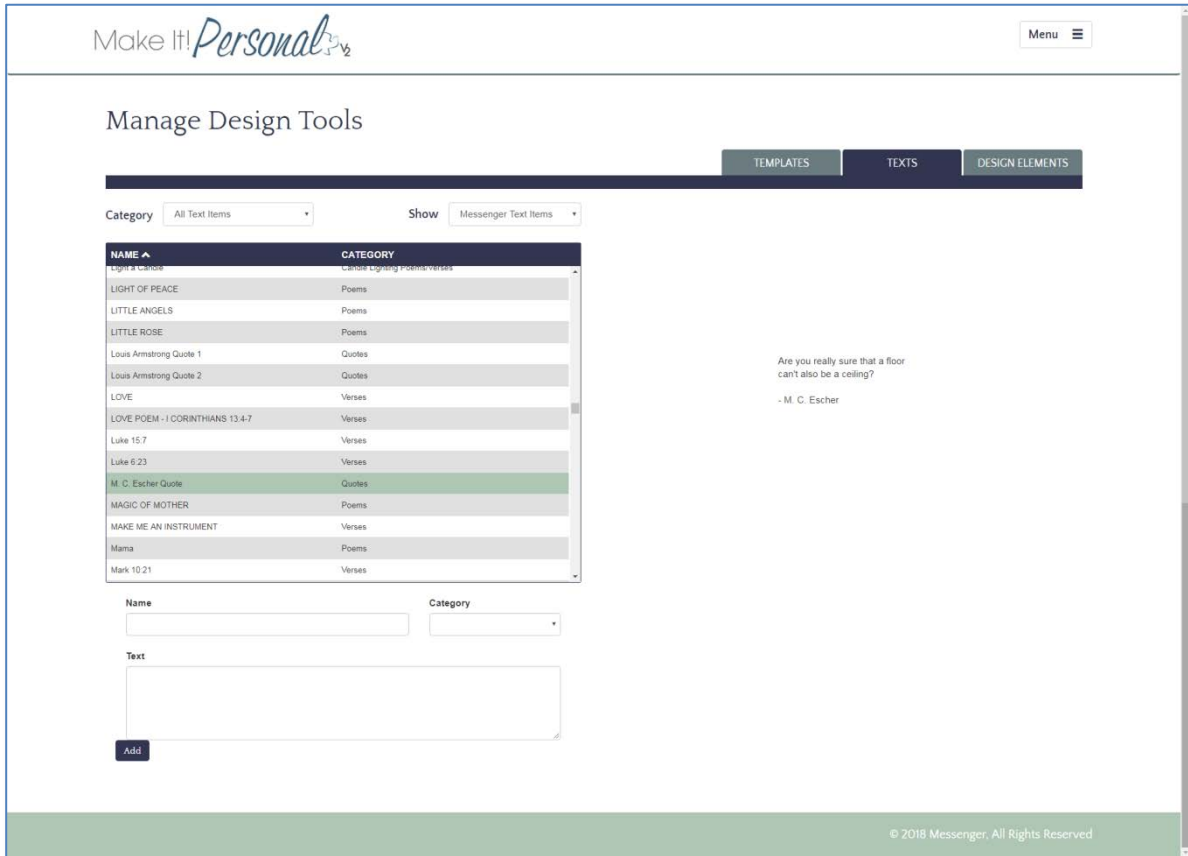
In this list of Texts, we have two criteria to filter our list results: **Category** and **Show**
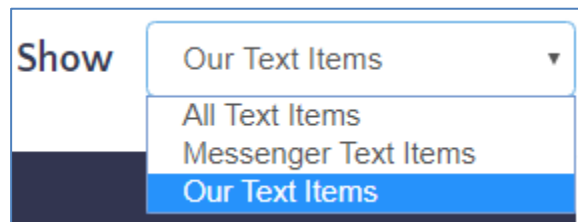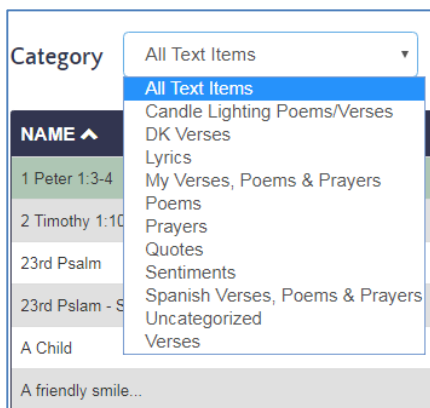
Category: Text Items in MIP are organized into categories to make them easier to locate.

Show: Text Items in MIP are either Messenger Text Items, or Our Text Items.

Messenger Text Items – Standard library of text items that cannot be modified or deleted

Our Text Items – Custom text items added by Funeral Home staff to their MIP account

All Text Items – Shows both Messenger and Our Text Items

Adding a new Custom (Our) Text Item

In the fields directly below the list of text items, provide a title for the item in the name field, then place it in a category that makes sense and type or paste the body of the text into the Text field. Click **Add** when done.

The new text item will now show up when viewing Our Texts, and will be available in both the FastTrack and Advanced Designer.

Name   **Category**

Text

Add

Name   **Category**

Epitaph on my own Friend   My Verses, Poems & Pr

Text

An honest man here lies at rest,
As e'er God with His image blest:
The friend of man, the friend of truth;
The friend of age, and guide of youth:
Few hearts like his, with virtue warm'd,
Few heads with knowledge so inform'd:
If there's another world, he lives in bliss;
If there is none, he made the best of this.

- Robert Burns

Add

Design Elements tab

In Make It Personal, you might notice that Design Elements and Text Items are almost a mirror of each other. They are managed and used in the same manner, only Text Items deal with text, and Design Elements deal with graphics / clip art.
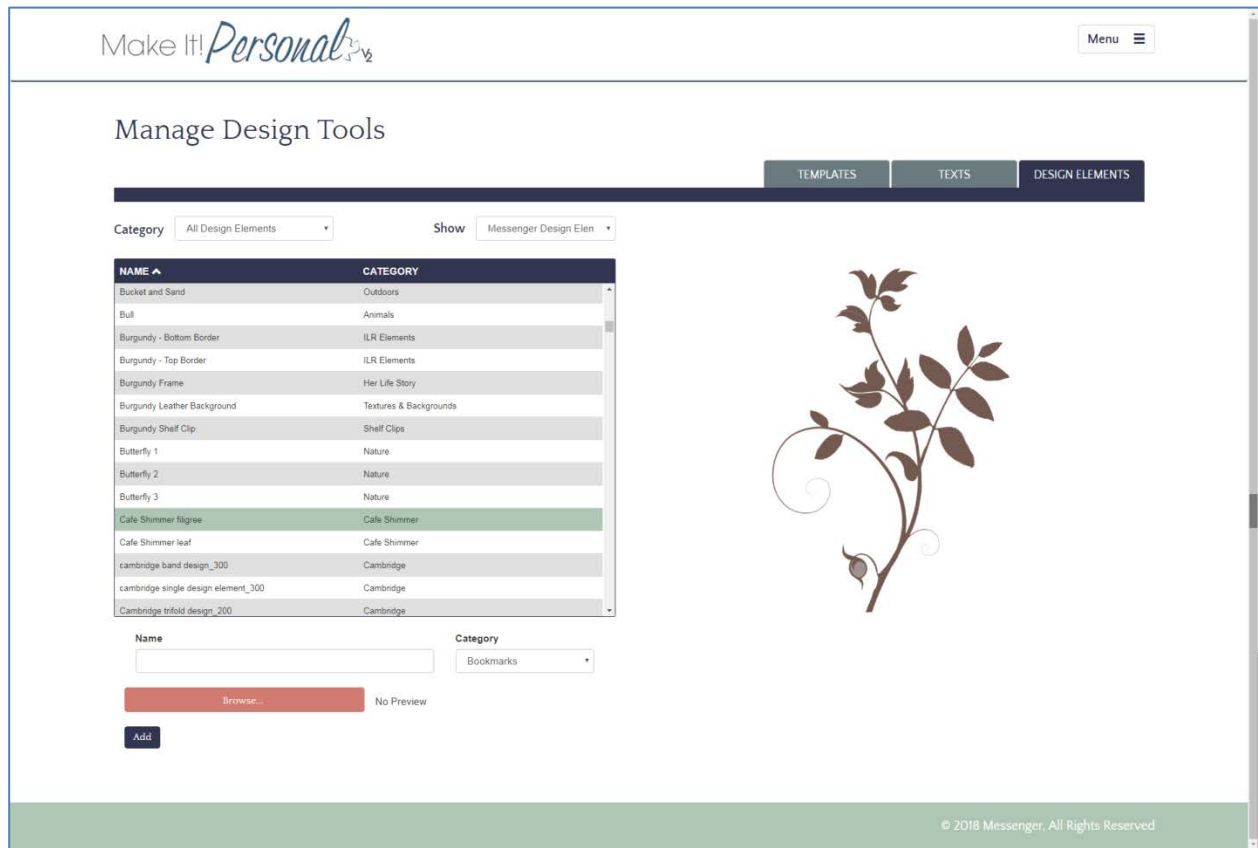
Once again we have two filters to determine what Design Elements populate the list:

Category: Design Elements in MIP are organized into categories to make them easier to locate

Show: Design Elements in MIP are either Messenger Design Elements, or Our Design Elements

Messenger Design Elements – Standard library of Design Elements that cannot be modified or deleted

Our Text Items – Custom Design Elements added by Funeral Home staff to their MIP account

All Text Items – Shows both Messenger and Our Design Elements

Adding a new Custom (Our) Design Element

Immediately below the list of Design Elements click the *Browse* button to locate a saved image to upload.

Give the custom design element a name and place it in a category. Click the *Add* button to save it.

The new custom Design Element will now appear in the list, with a preview to the right.
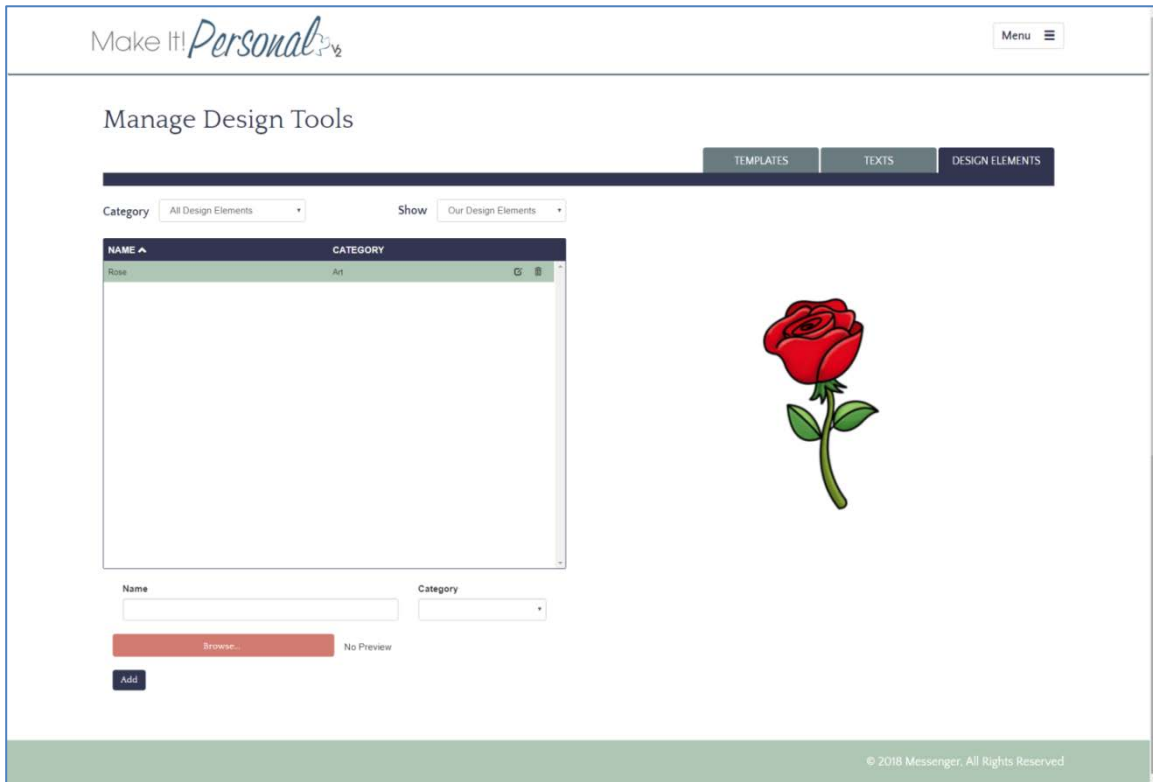
Managing Text Items and Design Elements

Once a custom Design Element/Text Item has been added to your account, you can change its name or category by clicking the edit icon to the right of its name. To delete it, click the trash can icon.