Agency Integrator

This **TechNote** describes recent enhancements to the **Memo Template Administration** module in **Agency Integrator**. **Memo Templates** have undergone our UI refresh and added enhancements to the memo editor, including **Drag and Drop**, **Search** functionality, **View Block** button, and more.

Contents

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Editor

To access the **Memo Editor**, click **Administration** on the main menu bar, **System**, **Memos**, and then click **Memo Templates**. Select the memo you want to work with and click the editor panel to open.
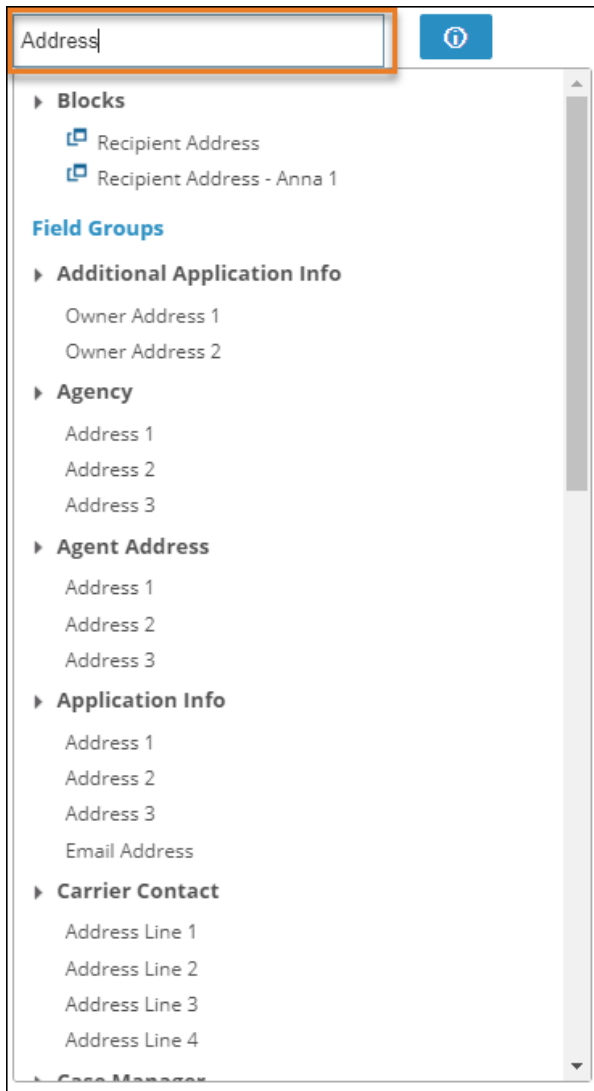

Drag and Drop

Now, quickly **Drag** and **Drop Blocks** and **Field Groups** from the editor sidebar to the template editor. After you locate the **Block** or **Field Group** from the sidebar, click and drag it to the location on the template, then drop it.

Editor Sidebar

The sidebar lists all available **Blocks** and **Fields Groups** to build memos.
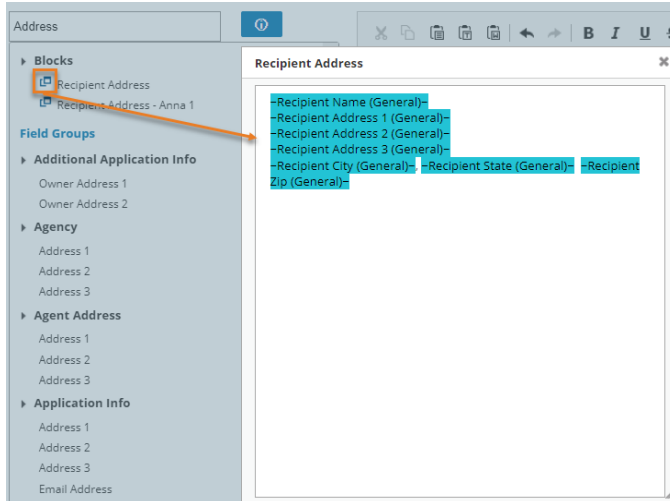
Search

A **Search** has been added to the new sidebar to assist with locating both **Blocks** and **Fields Groups**. Start typing and the list will expand all applicable collapsed sections and narrow your search.

View Block Icon

New **Icon** has been added next to all **Blocks** in the sidebar. The view block **Icon** lets you see what **Fields** are included in the selected block without leaving the screen or opening a new session. Clicking the view block **Icon**, a modal will open and display all fields that make up the block.
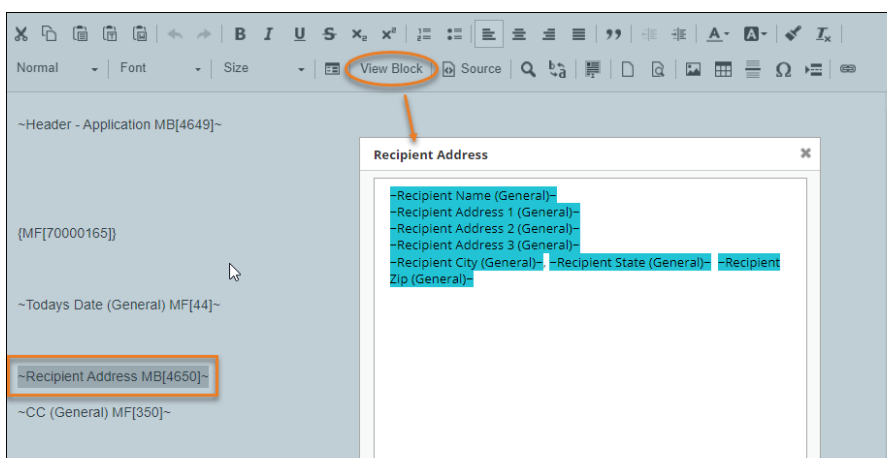

Editor Tools

We have added new tools and features to the memo editor toolbox.
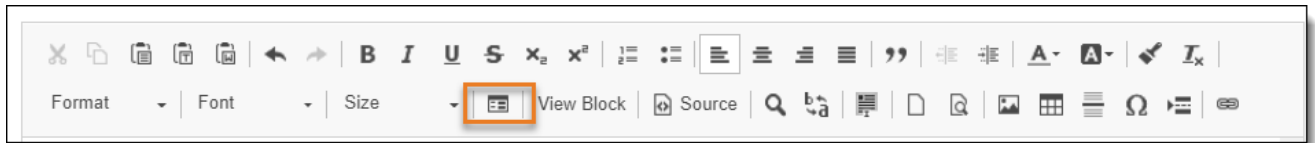
View Block Button

The View Block button works much like the **View Block** Icon but allows the user to highlight an existing block on the memo template to view what fields are included. To use the View block button, highlight the entire block name from one tilde to the other and then click the View block button.
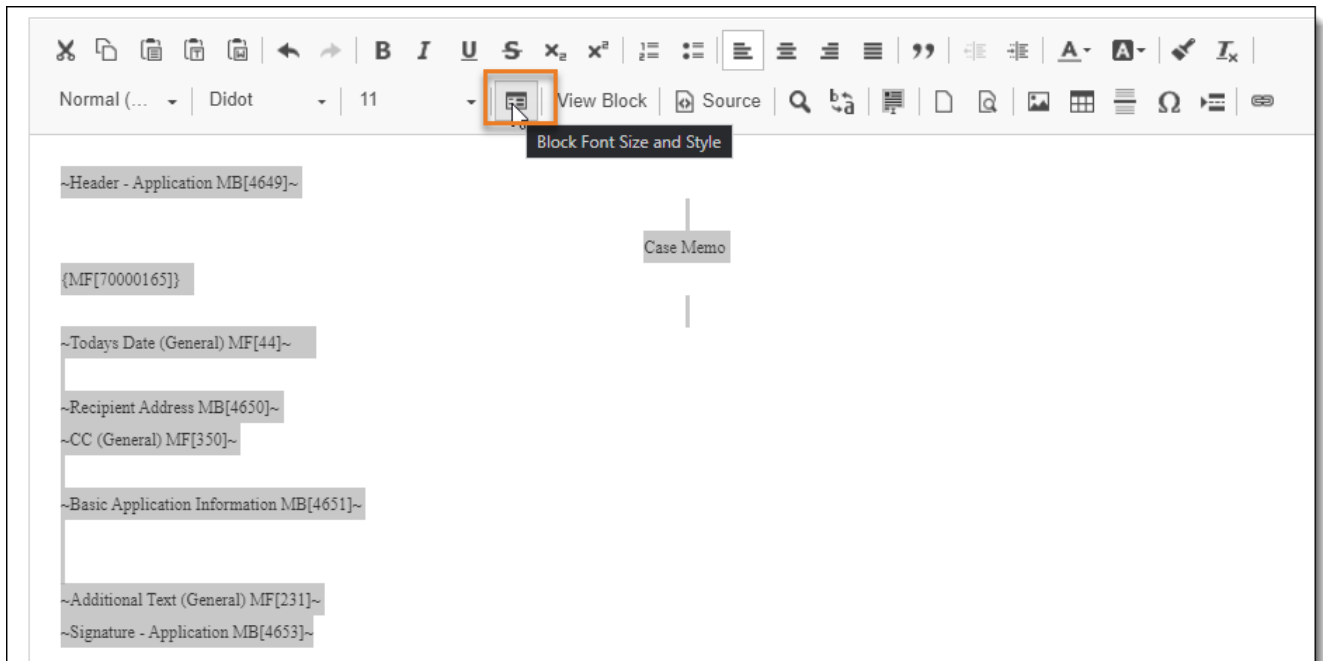

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Important Note: If you highlight more than one block and click the **View Block** button, it will only display the block contents of the first block highlighted.

Block Font Size and Style Icon

Added a new **Chart Icon** to the toolbox. The **Block Font and Size** Icon can be found here:

If you select text in the editor and then click the **Block Font Size and Style Icon**, it will go through the editor content and look for any blocks with font and size settings. If it finds font and size settings, it will change the block to the currently set font and/or size in the memo editor toolbar. This Icon will strip the **Font** and **Size** from the blocks and use the setting selected at the template level.
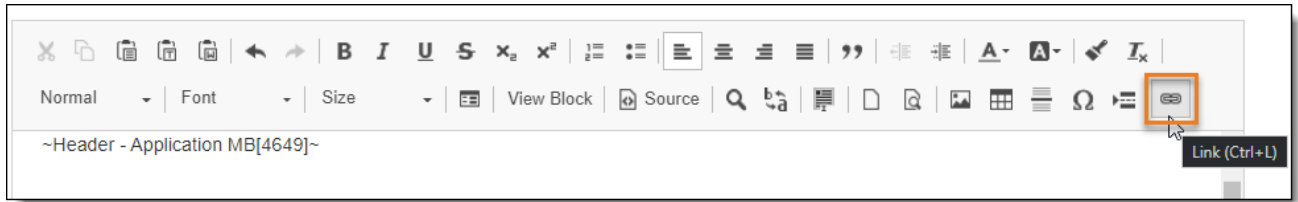

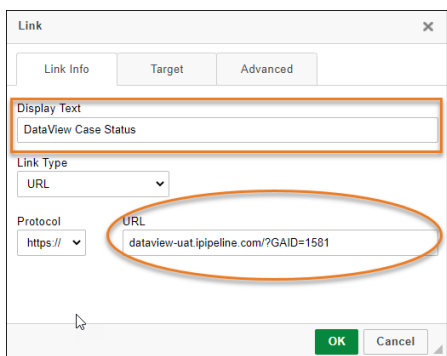It concludes this update with a universal message letting you know which blocks were changed.
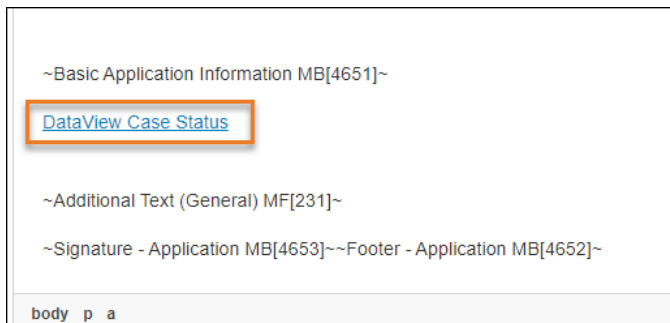
Hyperlinks

Can be added to the template without creating a table first. Click on the template where you would like the Hyperlink to display, and then click the Link Icon from the toolbox

Enter your desired Display Text and URL information

Click OK to save, and you will see the display text in the editor.

New Fonts

Added eight new **Fonts Styles** to pick from:

- Brushed Script MT
- Impact
- Didot
- American Typewriter

- Luminari
- Arial Black
- Bradley Hand

Tables

Now are easy to add and work with after selecting the table icon from the toolbox. Select your columns and row settings. Once the table has been added to your template, type or drag and drop fields.

~Basic Application Information MB[4651]~

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