



# Content Blocks in Emails

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## Introduction

A *content block* is a section of an email template that has been saved as a unit so that it can be reused in further email templates. Once a content block has been saved, any user with access to it can simply drag and drop it into any compatible email template.

### Note

Text-only email templates are not compatible with blocks.

Creating a library of content blocks that contain common elements or formatting that are to be repeated in many email templates saves time, as you do not need to re-create these blocks each time.

There are 2 varieties of content blocks: static and snippet.

## Static vs. Snippet Blocks

A *static* content block includes everything it needs within itself and does not make any calls to other code stored elsewhere, such as a snippet.

- A static block can be created by placing elements in a row using the email builder and saving the entire row, or it can be created using code in the code editor. The first method is recommended unless you are very comfortable writing and editing HTML code.
- A static content block can contain a text block with placeholder variables, such as `{{sender.f_name}}` as long as the placeholder is in the block itself.
- When a static block is placed in an email template, the copy now in the template is independent of the saved original block.
  - The copy of the block that exists in the template can be modified and saved in that template without affecting the original block or any other templates that used a copy of that block.



- The original block can be modified without affecting any templates that used a copy of that block.

#### Note

Static blocks are typically used for general layout elements and anything that would require a user to modify some part of it before sending, such as a text block.

A *snippet* content block features an `include` statement that references a snippet of code stored elsewhere.

- A snippet block can only be created using the code editor. The only code needed is the standard structuring code and the `include` statement. See Building a Snippet Block (Content Blocks Page) below.
- When a snippet block is placed in an email template, the email always refers to the current version of the snippet when the email is sent.
  - If the snippet is updated, any future emails that use a block including that snippet will automatically be sent using the updated version of the snippet. No modification of the email template is necessary.
- A snippet block can be placed and moved around in an email template, but its contents cannot be edited in either the email builder or email sender. It only renders the code in the snippet.

#### Note

Snippet blocks are typically used for a widely used segment that does not require a user to modify it, such as a signature block.

## Building a Static Block (Email Builder)

Static blocks consist of standard email elements assembled together in the email builder and saved as a unit. The instructions below begin with creating a new email template, but you can also create and save a block by editing an existing template.

1. Navigate to **Email Marketing → Emails**.
2. Click the **Create Email** button at the top of the page.
3. In the Template Gallery, select a template option that is compatible with blocks (do not select the Simple Text or Paste in code options on the Basic Content tab) by hovering the mouse pointer over an option and clicking the **Select** button.
4. In the Create Email box, enter a suitable name for the template and click the **Confirm and Save** button.
5. The email editor opens with the Elements tab in the left side panel selected. Drag an option from the Layouts section of this panel into the email.
6. Drag any desired components from the Elements section into the layout you just placed.

#### Tip

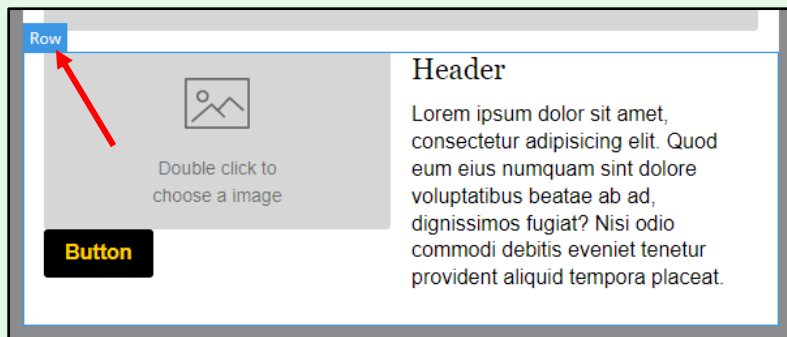
You can leave some element types, such as Text or Image as blank placeholders that can be filled in by any users who use the block later.

7. Click near the edge of the layout element to select the entire row.

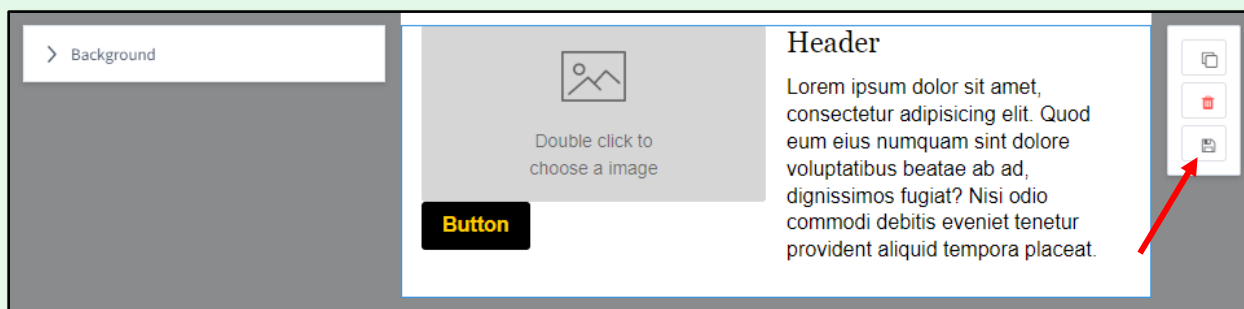


## Tip

Do not select any of the elements inside the layout element. You can see which element would be selected before you click by looking for a blue label at the upper-left corner of the element. You should click in a space where the label Row appears.



When the row is selected, you should see a collapsed menu with background options on the left and a box with 3 buttons, including the Save block button, on the right.



## Note

A block can only include the contents of a single row, and it always includes the contents of an entire row.

8. With the row selected, click the **Save block** button (the last button in the box on the right).
9. In the Save block to organization box:
  - a. Enter a name for the block in the **Name** field. This name will be displayed in the list of saved blocks.
  - b. In the **Type** drop-down list, select either **Header** or **Footer**, depending on the use of the block.
  - c. (optional) In the **Description** field, enter a text description of the block. This description is visible as part of the blocks entry on the Manage Marketing → Content Blocks page.
  - d. (optional) In the **Approval Notes** field, enter some text for the reviewer will see along with the block when they decide whether to approve the block or not. (see note below)
  - e. (optional) Check the **Comarketable** box if the block contains elements for both partners for a co-marketing template.
  - f. Click the **Request approval** button. (see note below)

## Note

If the user creating the block is not required to have their new block approved, the Approval Notes field is not shown, and the button is simply labeled Save.



Navigate to **Manage Marketing → Content Blocks** to see the new block in the list. Once the block is created, it can be published. See Publishing below.

## Approval (When Necessary)

If the user creating the block is required to request approval, the block is provided to the predetermined reviewer to decide whether to approve the block or not. The reviewer receives an email with a link they can click to go straight to the review page. (They can also navigate to **Email Marketing → Approval Requests**, where they would see a new entry in their list of items to review; there, they would click the **Review** button to access the same review page.) On that page, click the **Approve** button to approve the block for assignment.

## Use Case Examples

In all the examples below, a user sending the email can modify any elements in the static block, such as images or text, to suit their purposes. The following are just a few common ideas; you can create anything you want with the elements and formatting options available!

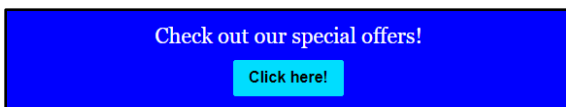
### Tip

Avoid putting too many elements into a single row. A highly complicated row may not render correctly in some email clients. A set of 2 blocks designed to be used together is still more repeatable than numerous individual elements.

You can create a header or banner by setting the background color of the row to a branded color, placing a single image in the row, and adjusting the size and padding of the image. You can also use spacer elements above and/or below the image to expose the background color.



You can create a call to action to drive traffic to your website by setting the background color of the row to a branded color, placing a text element and a button into the row, and setting the colors and text.



You can create a boilerplate with a 3-column layout, then add an image to the middle section and text on either side.



You can create a table inside a text element and use the formatting options to set up alternating row colors in the table.



Some data to consider...

Table Header	Data	Data
3rd quarter 2021	27	27%
4th quarter 2021	23	24%
1st quarter 2022	26	26%
2nd quarter 2022	24	24%

Signatures and footers generally use quite a few references to data stored in the Total Expert platform. While these could be created as static blocks, snippets are usually used to facilitate updates to many materials at once when necessary.

## Building a Snippet Block (Content Blocks Page)

A snippet block uses an `include` statement to call in a saved snippet. Snippets are created by TE's Content team and typically contain Liquid code that calls in information about the sender or recipient of an email, such as contact information for the sender in a signature block.

1. Navigate to **Manage Marketing → Content Blocks**. This page lists all the current blocks you have access to.
2. Click the **Create Block** button.

### Note

The Create Block button is shown only to users with permission. If the button is not shown, contact your system administrator.

3. In the Create Content Block box:
  - a. In the **Name** field, enter a name for the new block. This name will appear in the lists of blocks on this page and in the email editor.
  - b. In the **Marketing Channel** drop-down list, select **Email Marketing**.
  - c. Click the **Create Block** button.  
The content block creation page opens. This page is broken into 3 columns; from left to right, they are:
    - settings
    - code editor
    - preview
4. In the code editor portion in the center, locate the placeholder text `Write some code here`. Replace that text with `{% include 'sample_snippet_name' %}` (where `sample_snippet_name` is the system name of a snippet that includes the code for your block).
5. In the settings portion on the left:
  - a. Content Block section
    - i. **Name** – This field displays the name you entered when you created the block. You can change the name here.
    - ii. **Type** – Select either **Header** or **Footer** from the drop-down list. The selected label is applied as an attribute of the block.
    - iii. **Description** – Enter a text description of the block. This description is visible as part of the blocks entry on the Manage Marketing → Content Blocks page.
    - iv. **Stylesheet** – Select a saved style sheet that should be applied to the block. See *Email Builder* for more information on creating a style sheet.



- v. **Comarketable** – Check this box if the block includes information for both a primary marketer and a co-marketing partner.
- b. Content Placeholders section (These settings determine what information should be used to generate the preview on the right side of the screen. If these are left blank, any relevant placeholders in the block’s code are treated as blank.)
  - i. **Sender** – Select a user whose information should be used to populate any placeholders relating to the user who would be sending the email containing this block.
  - ii. **Recipient** – This field becomes available when a user is selected in the Sender field. This list is populated with the Sender’s contacts. Select a contact to populate any placeholders relating to the contact who would be receiving the email.
  - iii. **Product category** – This field becomes available when a contact is selected in the Recipient field. This list is populated with the types of products in your organization. Select a product type to populate any placeholders relating to a product in the block.
  - iv. **Product** – This field becomes available when an option is selected in the Product category field. This list is populated with the products that match the selected category. Select a product to populate any placeholders relating to a product in the block.
- c. Click the **Save** button. The preview section updates according to the selections you made.

### Warning

You must click the Save button to avoid losing your changes. If you reload the page or navigate away, any unsaved changes will be lost.

Navigate back to **Manage Marketing → Content Blocks** to see the new block in the list. Once the block is created, it can be published. See Publishing below.

## Editing an Existing Block

You can change the definition or settings of a saved block anytime after it is saved from the content blocks list page.

1. Navigate to **Manage Marketing → Content Blocks**.
2. Locate the block you want to publish and select [...] → **Edit**.
3. The same editor is shown as when creating a new block. Make any changes in the editor the same way you would when creating a new block.
4. Click the **Save** button.

## Publishing

Once a block has been created—either as a static block in the email builder or as a snippet block on the content blocks page—it must be published before it is available to users.

### Note

If the block needs to be approved but has not been approved yet, the entry for the block displays the label Pending. A block pending an approval can be published but will not appear in the email builder until it has been approved.

1. Navigate to **Manage Marketing → Content Blocks**.



2. Locate the block you want to publish and select [...] → **Publish as Base Block**.
3. In the Publish Base Content Block box:
  - a. In the **Type** drop-down list, select **Organization Content**.
  - b. Your organization's ID number appears in the Organization field; non-TE users cannot assign a block to a different organization.
  - c. Click the **Publish** button.

The block is now available in the Organization Content tab in the email builder.

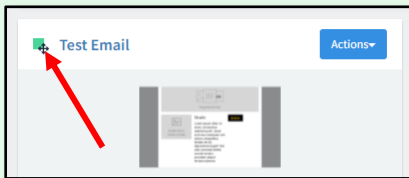
## Adding a Saved Block to an Email Template

Once a block has been published to the organization, users in that organization can add it to any email templates they create.

1. Navigate to **Email Marketing** → **Emails**.
2. Edit an existing blocks-compatible email template by selecting **Actions** → **Edit** or create a new one by clicking the Create Email button and selecting a compatible option from the Template Gallery.

### Tip

Saved email templates compatible with blocks are indicated with an icon next to the name.



3. In the email builder, click the **Blocks** tab on the far left edge of the page.
4. With the Blocks tab open, click **Organization Content** at the top of the panel. The panel lists all the blocks your user has access to, along with a preview of each.

### Tip

Type in the Search Blocks box to filter the list.

5. Click and drag the block into the email template.

### Note

You do not need to add a layout element to contain a block. A block is a full-width element that exists outside of any layout elements.