Template Snippets for Administrators

Template snippets are sections of text that are meant to be used more than once. These might be for repeating tasks, SMS messages (similar to email templates), or other contexts. They can also include Liquid tags to customize each instance where the snippet is used.

> **Tip**
> The tags listed in *Email Placeholder Tags* can also be used in template snippets.

By creating a single template snippet and referencing it in multiple places, if you ever need to change the content, you only have to change the template snippet, and every place where it is referenced will use the new version from that point forward.

Template Snippet Types

All snippet types work mostly the same way, but the types are used to limit which ones appear in which places. The types used in the TE platform are:

Type	Created From
Note	Add Note (journey component)
Notification	Send User Notification (journey component)
SMS	Send SMS (journey component)
Snippet	Template Snippets page (Manage Marketing → Template Snippets)
Task	Assign Task (journey component)
Website	[no longer used; worked with former dynamic website feature]

Creating Snippets

From Journey Components

1. Select **Journeys** from the navigation menu.
2. Click the **Create Journey** button.
3. In the journey editor, drag one of the following components onto the canvas (depending on the type of component you want to create):
   a. Add Note
   b. Send User Notification
   c. Send SMS
   d. Assign Task
4. Hover over the component and click the **Edit** button to open the Event Settings slide-out panel.
5. Scroll down to the Event Parameters section and click **Create New** under the Choose A Template field.

6. In the pop-up box:
    a. In the **Name** field, enter a descriptive name that will help you locate the template snippet in a list.
    b. In the **Content** field, enter the text and tags that you want to include in the template snippet itself.
    c. Click the **Submit** button.

The template snippet is saved and can then be selected from the Choose A Template drop-down list of any component of the same type.

From Template Snippets Page

Navigate to **Manage Marketing → Template Snippets**. This page lists template snippets of all types, not just those created on this page—however, it is only possible to create template snippets of the Snippet type here. These should only be created by Total Expert's content creation team or with their specific advice by advanced users.

Editing a Snippet

Once a snippet has been created, you can make updates to it from the Template Snippets page.

1. Navigate to **Manage Marketing → Template Snippets**.
2. Locate the snippet you want to edit and select the checkbox on the left side of the page.

Warning
Do not edit anything of the Snippet type. These should only be edited by Total Expert's content creation team or with their specific advice by advanced users.

Tip
You can filter the list by typing part of the snippet's name (not the system name) in the search box in the upper-right corner of the page. You can also sort the list by clicking the column headers.

3. Click the **Update Selected** button (pencil icon).
4. In the slide-out panel, make any desired changes in the **Name** and **Content** fields.

Warning
Do not change the system name. Anything that references the snippet by its old system name will no longer work.

Note
Whatever is entered in the Content field is treated as an HTML document and should be formatted as such.

Copying text from a source with any formatting and pasting it into this area may result in unintended code being generated in an attempt to mimic the source formatting.

5. Click the **Submit** button at the top of the panel.

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