



Content building

September 2023

1 Foreword

Copyright

The contents of this manual cover material copyrighted by Marigold. Marigold reserves all intellectual property rights on the manual, which should be treated as confidential information as defined under the agreed upon software licence/lease terms and conditions.

The use and distribution of this manual is strictly limited to authorised users of the Marigold Messaging Professional Software (hereafter the “Software”) and can only be used for the purpose of using the Software under the agreed upon software licence/lease terms and conditions. Upon termination of the right to use the Software, this manual and any copies made must either be returned to Marigold or be destroyed, at the latest two weeks after the right to use the Software has ended.

With the exception of the first sentence of the previous paragraph, no part of this manual may be reprinted or reproduced or distributed or utilised in any form or by any electronic, mechanical or other means, not known or hereafter invented, included photocopying and recording, or in any information storage or retrieval or distribution system, without the prior permission in writing from Marigold.

Marigold will not be responsible or liable for any accidental or inevitable damage that may result from unauthorised access or modifications.

User is aware that this manual may contain errors or inaccuracies and that it may be revised without advance notice. This manual is updated frequently.

Marigold welcomes any recommendations or suggestions regarding the manual, as it helps to continuously improve the quality of our products and manuals.

2 Table of Contents

1	Foreword	2
2	Table of Contents	3
3	Introduction	5
4	Header & Footer Content Blocks	6
4.1	Header Content Block	7
4.2	Footer Content Block	8
4.3	Hero Images	9
4.3.1	Static Fixed Image	10
4.3.2	Static Editable Image	10
4.3.3	Selectable Static Images	11
4.3.4	Using a Data Source List	12
4.3.5	Filtering on record creation/modification date	16
4.3.6	Setting viewing dates	17
5	Divider & Article Content Blocks	20
5.1	Divider Content Block	21
5.2	Article Content	21
5.2.1	Manual Design	21
5.2.2	Article Content Blocks	22
5.2.3	Using Data Selection Lists	23
5.3	"Featured Article" Hero Image	27
5.3.1	Data Selector for the Hero Image	27
5.3.2	Data Selector for the Article content	29
5.3.3	Which Featured Article?	30
5.4	Data Selection List design	33
6	Using Templates	34
6.1	Template Design	34
6.2	Instance Creation (from the template)	35
7	AB Designs	37
7.1	Using Live Content	37

3 Introduction

This topic explores different **content design** approaches to create deliverable assets to be used in such a way that repetitive work can be refactored to provide greater consistency and reduced reworking. Focus concentrates upon three areas:

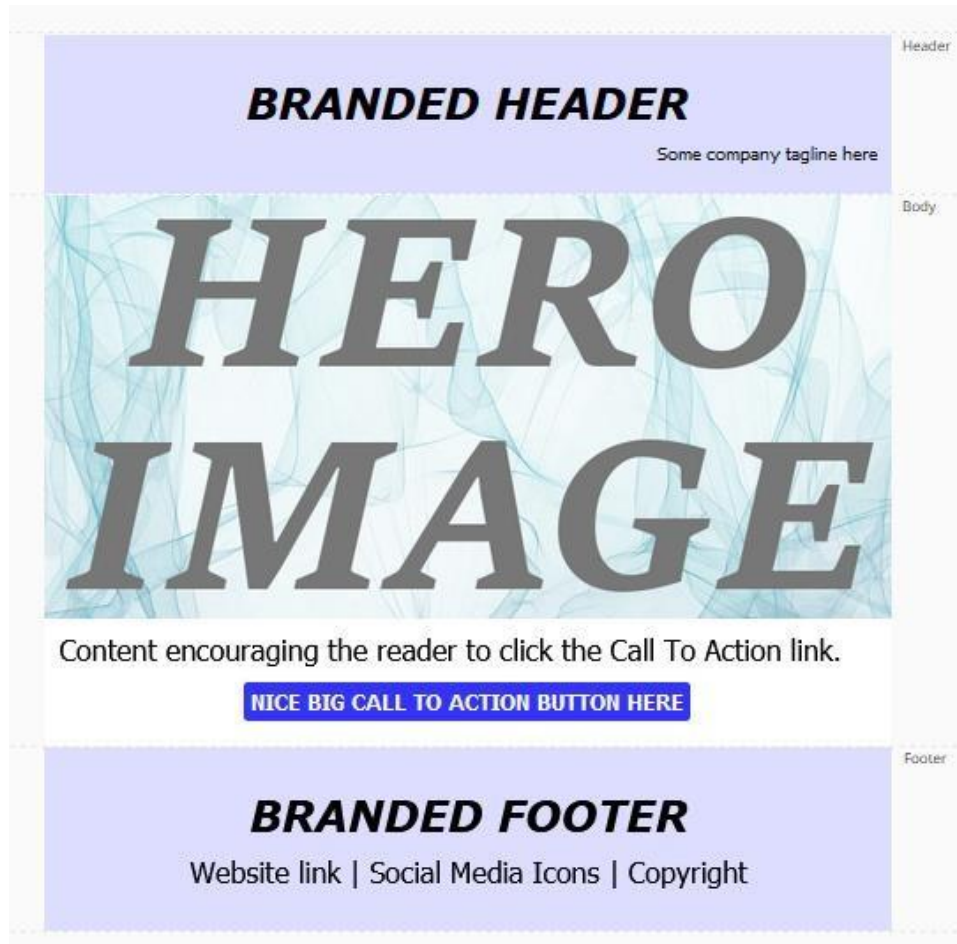
- Content Block design for consistency and reuse
- Repeaters to surface content held in lists
- Templates and associated functionality.

Typical usages of these techniques are:

- A **Newsletter** suitable for Single-batch journey execution
- Templates, suited to multiple Single-Batch Journey reuse
- Use of **Live Content** and **Smart Content** for AB Journeys
- An **Order Confirmation**, suited for Transactional Journeys
- A **Loyalty Voucher**, intended for use with Custom Events

4 Header & Footer Content Blocks

Most marketing emails follow a typical structure, for example:



Points to note here are:

- **BRANDED HEADER** – Will typically feature some business logo, may also include some links and a tagline but it's the most prominent company brand initially viewed so additional content should not cause a distraction
- **BRANDED FOOTER** – Contains similar styling to the header, perhaps a smaller version of the logo. Other items that may be featured here are:
 - Links to website/login/signup process/T&Cs – normally text
 - Links to social media platforms (company Facebook/Twitter/LinkedIn/Instagram), usually recognisable icons
 - Non-clickable imagery, e.g.: awards ("Voted best"), accreditations ("Good Business Affiliation"), etc.
- **HERO IMAGE** – A large eye-catching image that's usually the focus of the communication, for example: new deals, special offers, personalised greeting, etc.


- CALL2ACTION – A prominent tracked link (usually styled as a button) that the viewer will click to follow for more details. Usually appears above the "fold line".
- Additional text that forms the context of the message to encourage clickthrough/conversion.

There are several advantages to using Content Blocks for re-usable content, [described here](#)

Note: All code for these Content Blocks can be downloaded to use within any designs, but contain defined style classes that are provided by the Engage **Responsive Design Editor**. Using these Content Blocks in a blank document or imported design requires those same styles (provided as **responsive.css**) to be included somewhere in the asset:

CREATE A NEW MESSAGE

CSS INCLUDED




Responsive Design Editor

Use the drag-and-drop editor to create a bespoke responsive email that will stand out in your customers inbox.


Select Email Type

Select a content type below to get started



Blank message

Create your email directly within an empty message and use the wysiwyg editor to build your email and/or code your email in source mode.




Import file

Import your own custom coded html file or archive file with html and images. You can also choose to further personalize your content by using the wysiwyg editor and/or code the email in source mode.


Select Page Type

Select a content type below to get started



Blank page

Create your page using the wysiwyg editor or code your page in source mode.



Import file

Import your own custom coded html file or archive file with html and images. You can also choose to further personalize your content by using the wysiwyg editor and/or code the page in source mode.

Styles needed

4.1 HEADER CONTENT BLOCK

An example header Content Block could look like:



This Content Block ([plantopia-1-header](#)) contains:

- Company logo and name (Plantopia)

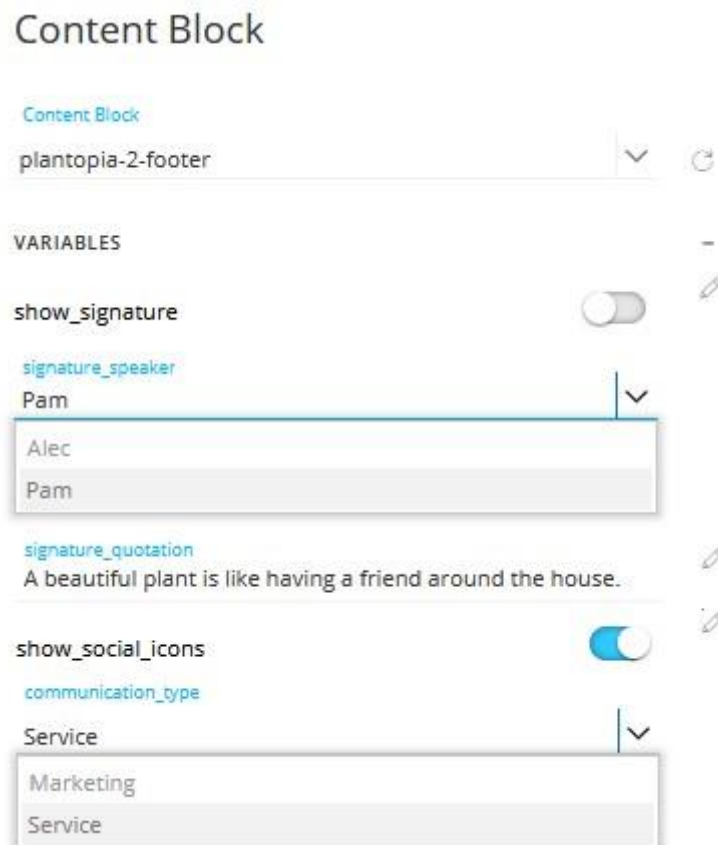
- Webversion link, surrounded by a condition to hide it from browsers (so this block can also be used in pages)

Note: the Webversion link uses a DICTIONARY to display the translated version according to the reader's language.

4.2 FOOTER CONTENT BLOCK

Similarly, a **branded footer** (plantopia-2-footer) Content Block contains:

- A toggle to show/hide a signatory
- A selector to choose a name for the signature block (if the signature is to be displayed)
- A text variable to provide a quote for the signer, with default text provided
- A toggle to show/hide social media icons
- Links to Social Networking sites (one currently incomplete)
- A selector to switch between SERVICE and MARKETING emails (thus affecting the unsubscribe link):



The screenshot shows the configuration for a 'Content Block' named 'plantopia-2-footer'. It features several settings:

- VARIABLES:**
 - show_signature:** A toggle switch currently turned off.
 - signature_speaker:** A dropdown menu with 'Pam' selected. The dropdown list shows 'Alec' and 'Pam' as options.
 - signature_quotation:** A text field containing the quote: 'A beautiful plant is like having a friend around the house.'
 - show_social_icons:** A toggle switch currently turned on.
 - communication_type:** A dropdown menu with 'Service' selected. The dropdown list shows 'Marketing' and 'Service' as options.

Note: the use of `sg:var` for `signature_quotation` means the textual content is not translated but fixed. For localization, consider using an `sg:text` or `sg:content` component, or a pre-translated selectable list of quotes in a Dictionary.

Example of configured appearance:



The links for the social icons in the Content Block are presented as incomplete:

```
<a data-link="Facebook-Plantopia" href="https://facebook.com/plantopia">
```

```
<a data-link="Instagram-Plantopia" href="">
```

Examining the list of links shows both **data-link** names, but one requires the marketer to complete the configuration:



Similarly, the code to provide unsubscribe links looks like:

```
<sg:conditional id="unsubscribe_marketing" expression="all(eq([VARIABLE.communication_type], 'Mkt'))">
  <a style="color: #26a66b; font-weight: 400;"
href="sgmc://journey/1234/1?CAMPAIGN=[%journey('name')]&CAT=Marketing" data-link="unsubscribe_marketing" unsubscribe-link="true">
  Unsubscribe from marketing mails</a>
</sg:conditional>
```

The unsubscribe journeys will need to exist before [their URLs are written in this format](#). Note also both links in the Content Blocks contain **unsubscribe-link="true"** attributes. [Read more about the unsubscribe attribute here](#).

4.3 HERO IMAGES

Adding a Hero Image is a simple manual process – at minimum, it will be:

- In a row, add an image component
- Configure the image path
- Add Alternate text
- Specify the link when clicked

With higher volumes of content, this repetitive work becomes onerous and runs the risk of failure. By creating the Hero Image as a Content Block, the marketer simply needs to drag a Content Block component into the row which can either provide the other information as necessary or provides a fixed formatting to content and consistent brand styling – so marketers are then provided with:

- A static image encapsulated by a content component, allowing the marketer to swap out the image
- An enumerated range of static images with a selector that allows the composer to select one
- An image from a repeater that dynamically displays something dependent upon the date

4.3.1 STATIC FIXED IMAGE

A typical case in which the code ([plantopia-3a-hero](#)) replaces all of the manual work (typical brand logo, fixed webversion link and alternate text) for speed and consistency.

```
<!-- :: Start Hero image - using a static image -->
<table role="presentation" border="0" cellpadding="0" cellspacing="0" width="100%"
bgcolor="#fafafa">

    <tr>
        <td class="m_hide" style="font-size:0;line-height:1px;height:1px;"
height="1">&nbsp;</td>
        <td class="m_wrapper" style="width:600px;">
            <!-- +++ replace this with <a data-link="SMC_Link_Name" href="">
to allow the marketer to set their own link +++ -->
            <a data-link="Hero Image" href="https://en.wikipedia.org/wiki/Plant" target="_blank"
rel="noopener noreferrer" style="text-decoration:none;cursor:default;">

            </a>
        </td>
        <td class="m_hide" style="font-size:0;line-height:1px;height:1px;"
height="1">&nbsp;</td>
    </tr>
</table>
<!-- :: End Hero image -->
```

4.3.2 STATIC EDITABLE IMAGE

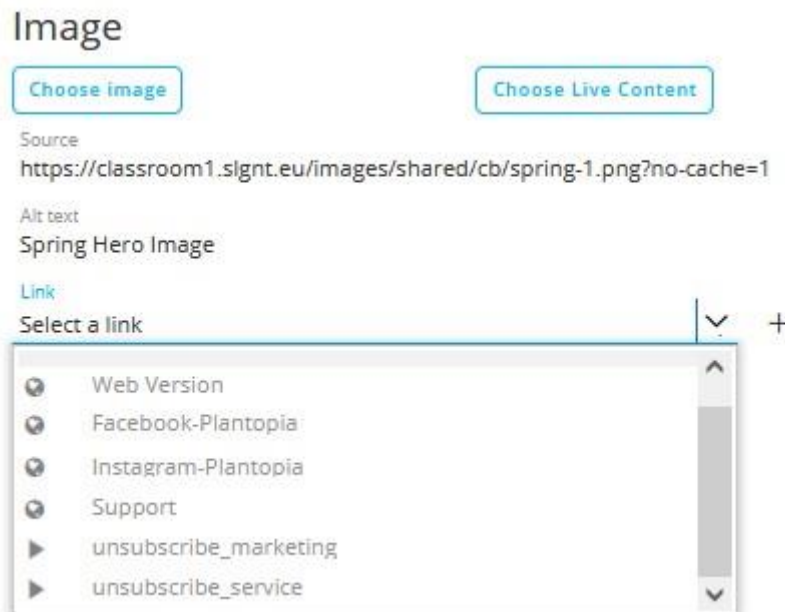
This code block ([plantopia-3b-hero-editable](#)) makes use of `<sg:image>` (instead of plain ``) means that the image itself is presented as an IMAGE CONTENT component, rather than a fixed embedded image:

Content Block



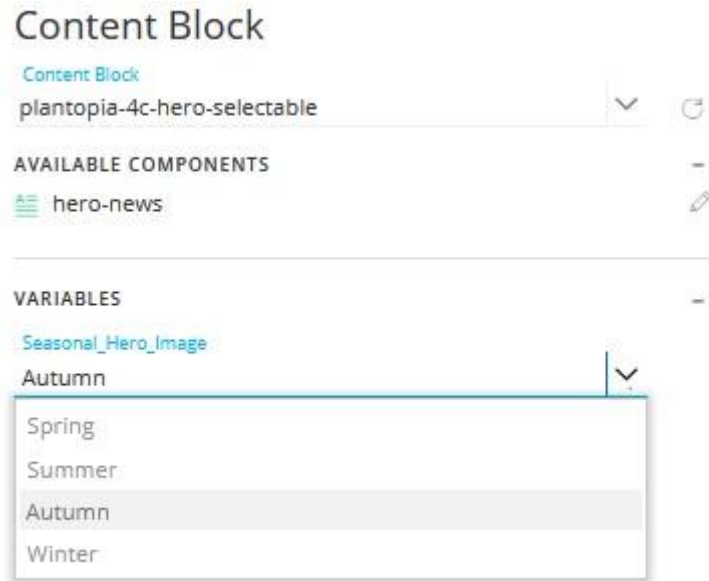
Clicking the pen permits a marketer from amending the image properties, including:

- Source path to the image (or Live Content, if provisioned)
- Alternate text
- Styling options, including the flexibility of specifying custom CSS syntax to represent the image (which may conflict with predefined styles already in place)
- Link target when clicked, for example:



4.3.3 SELECTABLE STATIC IMAGES

In plantopia-3c-hero-selectable, an enumerated choice of images is presented using a variable, so the marketer simply selects an option from the presented choices:



Also included is a TEXT CONTENT component, which provides a multilingual rich-text region for optional text to be added, along with a **Call To Action** should one be required.

4.3.4 USING A DATA SOURCE LIST

The previous approaches requires that the selectable images be defined in the Content Block as enumerated choices, meaning code updates to the Content Block as new images become available and require including.

An alternative approach is to populate a [Data Selection List](#) with the available choices, meaning that new images are simply created as new records in this list and the Content Block dynamically fetches the right image.

First, begin by creating a Data Selection List containing attributes needed for a hero image, e.g.:

- Source path to the image – a URL
- Alternate text for this image

HERO_IMAGES

Properties Fields Relations Data Segments History

Fields

NAME	TYPE	LENGTH	DESCRIPTION
ID	Numeric		
CREATED_DT	DateTime		
MODIFIED_DT	DateTime		
TAXONOMY	Text	200	
LANGUAGE	Text	5	
IMAGE_URL	Text	100	Path to the URL
ALT_TEXT	Text	50	Alternate Text
CTA_URL	Text	100	Call2Action when clicked

Then populate this list with some example content, for example:

Data

IMAGE_URL	ALT_TEXT	CTA_URL
https://classroom1.slgnt.eu/images/shared/cb/spring-2.png	Springtime is here!	https://www.selligen
https://classroom1.slgnt.eu/images/shared/cb/summer-2.png	Summertime, and the living is easy...	https://www.selligen
https://classroom1.slgnt.eu/images/shared/cb/autumn-2.png	Fallen leaves on the ground...	https://www.selligen
https://classroom1.slgnt.eu/images/shared/cb/winter-1.png	In the bleak midwinter...	https://www.selligen

Add a new record

ID	auto generated
CREATED_DT	<input type="text"/>
MODIFIED_DT	<input type="text"/>
TAXONOMY	<input type="text"/>
LANGUAGE	<input type="text"/>
IMAGE_URL	https://classroom1.slgnt.eu/images/shared/cb/winter-1.png
ALT_TEXT	In the bleak midwinter...
CTA_URL	https://www.selligen.com

Note: a common approach is for the list is populated with content from external sources (e.g.: API calls, or a data export) such as news articles or new products introduced to the product catalog, and the email would then publicise this information – separating the actual business content from the presentation and design elements.

Next, for the email, [create a Data Selection](#) that exposes this information:

DATA SELECTIONS: SEASONAL_IMAGE

1. Data selection - Provide a name and a source for your data selection

Name*

Seasonal_image

Data Source*

hero_images

Select the fields that are to be displayed by the repeater (will use the [%itemValue('fieldname')%] personalisation):

2. Field selection - Select the desired fields and optionally provide an alias

Field	Alias	Usage ⁱ	Mandatory	Multivalue ⁱ
<input type="checkbox"/> ID		Read-only		
<input type="checkbox"/> CREATED_DT		Read-only		
<input type="checkbox"/> MODIFIED_DT		Read-only		
<input type="checkbox"/> TAXONOMY		Multiple values		
<input type="checkbox"/> LANGUAGE		Read-only		
<input checked="" type="checkbox"/> IMAGE_URL		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> ALT_TEXT		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> CTA_URL		Text	<input type="checkbox"/>	

Key field
+

For the moment, simply show one record from this list:

3. Filters - Provide the desired type of filtering

Sorting
+

Filter
+

Maximum number of items to display*
1

Matching

Audience field	Operator	Data selection field
Start typing to search for an audience field ...		

Don't send the message when there is no content for this data selection.

Include items without a language.

Use as a lookup data selection

Note that as each of the DSL records have no language associated with them, the "Include items without a language" option is ticked. Alternatively, the language setting could be useful for Hero Images (Atomium, London Bridge, Eiffel Tower) which are locale specific so that language filtering selects the appropriate image.

Now the [plantopia-3d-hero-article](#) Content Block can use [%itemValue('fieldname')] personalisations to display values from this Data Selection:

```
<!-- :: Start Hero image: displays content fetched by the Data Selection -->
<table role="presentation" border="0" cellpadding="0" cellspacing="0" width="100%"
bgcolor="#fafafa">

  <tr>

    <td class="m_hide" style="font-size:0;line-height:1px;height:1px;" height="1">&nbsp;</td>
    <td class="m_wrapper" style="width:600px;">
```

```

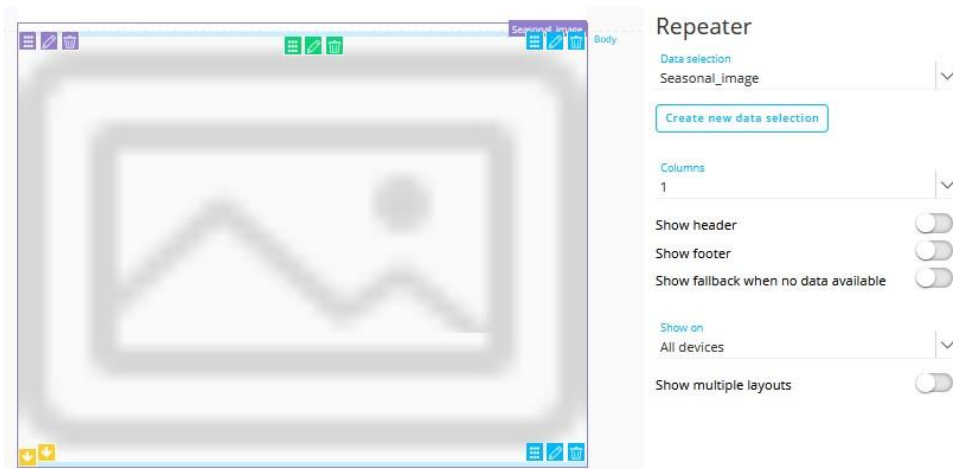
<a data-link="Hero Image" href "[%itemValue('CTA_URL')]" target="_blank"
rel="noopener noreferrer" style="text-decoration:none;cursor:default;">
  <img id="OWATemporaryImageDivContainer1" class="full"

  src "[%itemValue('IMAGE_URL')]" alt "[%itemValue('ALT_TEXT')]" border="0"
  width="600" style="width:600px; max-width:100%; display:block;" />
  </a>
</td>

<td class="m_hide" style="font-size:0;line-height:1px;height:1px;" height="1">&nbsp;</td>
</tr>
</table>
<!-- :: End Hero image -->

```

Finally, add the Content Block to a row inside a repeater that uses the Data Selection:



The order of components added to the email will be:

- A blue **row** component into the Body section
- A green **repeater** component added to this row (will then show a purple outline)
- The purple repeater **configured** (Data Selection, single column, etc)
- A blue **row** added into the purple repeater region (for each record)
- A green **Content Block** component added into this repeater row 6. Selecting the appropriate Content Block to display the DSL values.

The finished results look like:



However, if there are several Hero Image selections, which one is picked? There are a number of approaches to be explored here:

- Use a filter to select the most recently-added (or changed) record
- Use a set of date fields to specify when the image should be shown (and a filter to select the right one)
- Use a template and permit manual selection of a particular record.

This approach involves the greatest initial work in creating such a feature, but once created the cost of ongoing work is drastically reduced, so should be seen as an option for heavier usage (e.g.: articles with multiple fields, or several rows) – reducing the repetition of managing upwards of fifty images with alternate text and links etc for every email.

For situations in which this Content Block is infrequently used, or the selection rarely made (e.g.: multiple messages that involve repeated use of the same branded image) this approach may over-complicate what should be a simple task.

As with the previous approaches, potential use cases and prior history should help justify which methods are considered the most suitable for content creation and reuse potential.

4.3.5 FILTERING ON RECORD CREATION/MODIFICATION DATE

This is probably the simplest approach. Simply select one (or more) of the date fields in the Data Selection:

2. Field selection - Select the desired fields and optionally provide an alias

Fields

Field	Alias	Usage ⁱ	Mandatory	Multivalue ⁱ
<input type="checkbox"/> ID		Read-only		
<input checked="" type="checkbox"/> CREATED_DT		Read-only		
<input checked="" type="checkbox"/> MODIFIED_DT		Read-only		
<input type="checkbox"/> TAXONOMY		Multiple values		
<input type="checkbox"/> LANGUAGE		Read-only		
<input checked="" type="checkbox"/> IMAGE_URL		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> ALT_TEXT		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> CTA_URL		Text	<input type="checkbox"/>	

Then filter against one of those date fields to ascertain which should be at the "top of the list", e.g. last modified:

3. Filters - Provide the desired type of filtering

Sorting

+ MODIFIED_DT ↓ ✕

Filter

+

Maximum number of items to display*

1

Now, **the record most recently altered** will cause that image to display as the Hero image.

Note: although this makes the selection of Hero Image more dynamic, it not only affects new communications going forwards but prior ones also: recipients clicking links (e.g., [Webversion](#) or article links) of their email may be confused by arriving at a different target as the filter will then cause a newer image to be displayed, rather than the original one present in their email. Testing is important!

4.3.6 SETTING VIEWING DATES

The previous technique requires manually tweaking a DSL record to cause it to be selected by the DS. This idea could be extended by specifying date ranges in which the images will be displayed and filter to match which range today falls into.

HERO_IMAGES

Properties **Fields** Relations Data Segments History

Fields

NAME	TYPE	LENGTH	DESCRIPTION
CTA_URL	Text	100	Call2Action when clicked
START_DATE	Date		"From" date: only show from this date
END_DATE	Date		Expiry date: after this date, stop show

Then add dates when these images will appear for each of the records, for example to pick seasons:

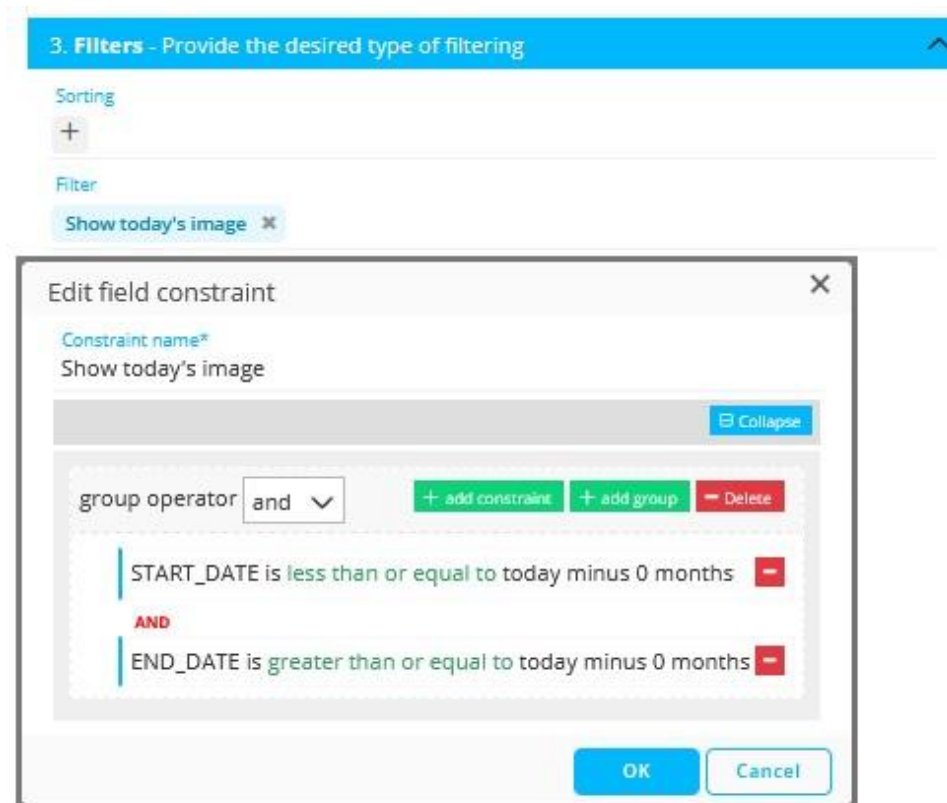
HERO_IMAGES

Properties Fields Relations **Data** Segments History

Data

IMAGE_URL	ALT_TEXT	START_DATE	END_DATE
https://classroom1.slght.eu/images/shared/cb/spring-2.png	Springtime is here! Nice!	16 Nov 2019	15 Feb 2020
https://classroom1.slght.eu/images/shared/cb/summer-2.png	Summertime, and the living is easy...	16 Feb 2020	15 May 2020
https://classroom1.slght.eu/images/shared/cb/autumn-2.png	Fallen leaves on the ground...	16 May 2020	15 Aug 2020
https://classroom1.slght.eu/images/shared/cb/winter-1.png	In the bleak midwinter...	16 Aug 2020	15 Feb 2021

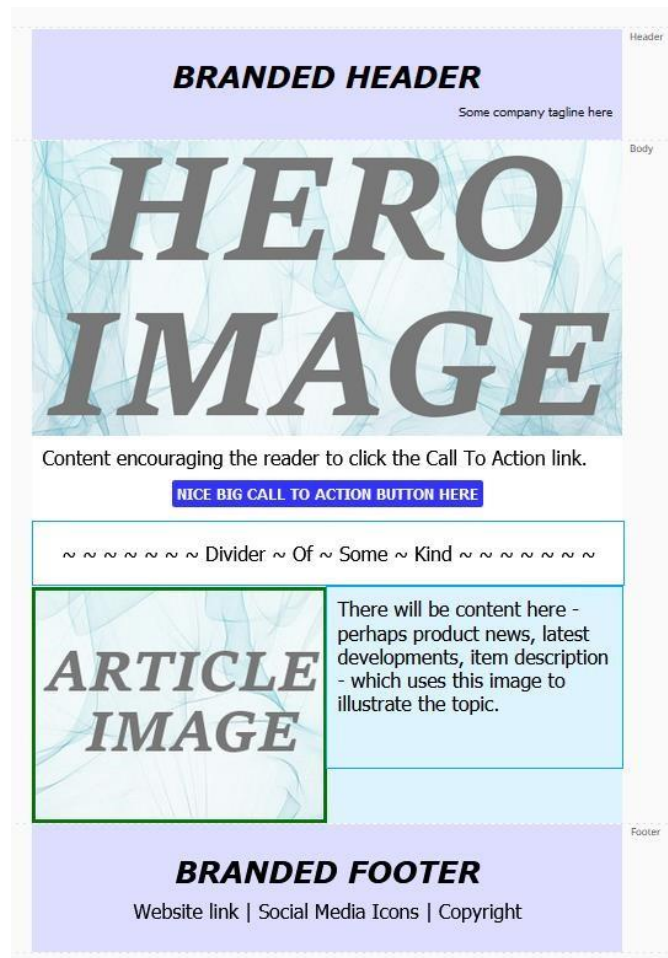
Next, in the Data Selection, use a filter to specify that today's date must lie between the record's START_DATE and END_DATE:



This ensures the appropriate image for those dates will be displayed but requires list maintenance to keep future content available. However, **this approach still suffers from the dynamic matching aspect**, in that updates to the DSL records do not cascade to historical emails already sent – so recipients clicking older emails could be inadvertently directed to a new destination.

5 Divider & Article Content Blocks

A more complex newsletter may expand upon the basic format, for example:



In this case, the additions here are:

- **CONTENT** – row(s) of additional information, e.g.: products, news articles, featured items (presented using a repeater) - each with links for more information
- **DIVIDERS** – branded breaks between sections.

Although there are several different approaches to achieving the same design, thought must be given to design reuse in respect to the work needed to produce regular communications. Typical approaches include:

- Create the email design once; duplicate it for each repeat and amend the changed sections
- Create the email design as a template and lock static areas (e.g.: branded header/footer) to prevent accidental change
- Create static sections as Content Blocks which can be re-used across a range of different channels

- Create dynamic sections as Content Blocks with variables to quickly control options and placeholders for custom content
- Create dynamic sections as Content Blocks that fetch content from a list and surface it, using repeaters

Each approach can be easily combined, but in general the more work invested upfront in creating a repeatable process, the less work needs to be done for each repeated iteration (desirable for marketers). However, if the sending of different messages is relatively small then this may not justify the initial effort of creating a repeatable process for so few messages.

5.1 DIVIDER CONTENT BLOCK

This Content Block provides a divider to break up content and simply contains some responsive HTML with a 3-column table to show a centralized image. [[plantopia-4-divider](#)]:



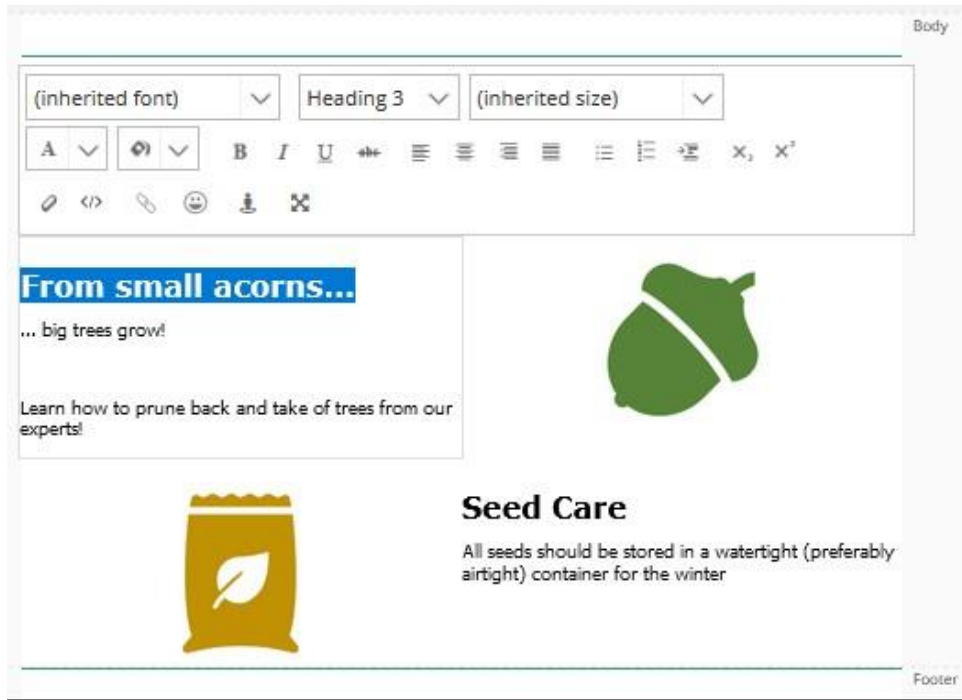
5.2 ARTICLE CONTENT

Each newsletter-style communication will also feature an article with a "call to action". Again, there are different approaches:

- Manually add a text component and a button and configure them accordingly (usually the initial approach)
- Use a Content Block to define placements of `<sg:content>` , `<sg:button>` and `<sg:image>`, with a switch to change the order
- Build a list of articles with the right content, and surface the appropriate one using a repeater

5.2.1 MANUAL DESIGN

This is relatively straightforward, using two-column rows to show text with a corresponding image, for infrequent communications where the manual overhead is low:



5.2.2 ARTICLE CONTENT BLOCKS

This code ([plantopia-5a-article](#)) presents an article structure and definition, with a switch determining if the text appears to the left or the right of the image. This Content Block can then be dragged into a single-column row component and the marketer can tweak the content appropriately:



The AVAILABLE COMPONENTS panel then requires the marketer to provide:

- The article TITLE
- The article DESCRIPTION – content for the article, including links if needed

- The accompanying IMAGE (and URL if clicked)
- The layout configuration: text to the left or right of the image (left in this case).

For example, two articles using the same Content Block but opposing layout configuration could look something like:



Additional rows for more articles can be added as the marketer sees fit.


5.2.3 USING DATA SELECTION LISTS

For communications with a larger number of articles, a recommended approach is to store content and accompanying details in a Data Selection List then use a repeater containing a Content Block to transform and present the fetched records accordingly.

5.2.3.1 CREATING THE LIST OF ARTICLES

As before, begin with a Data Selection List (**News_articles**) with the respective content, for example:

Fields

NAME	TYPE	LENGTH	DESCRIPTION
 ID	Numeric		
CREATED_DT	DateTime		
MODIFIED_DT	DateTime		
TAXONOMY	Text	200	
LANGUAGE	Text	5	
TITLE	Text	20	Article Title
CONTENT	Text	100	Written content!
IMAGE_URL	Text	150	Path to the article image
CALL2ACTION	Text	150	Where to click
SHOW_AFTER	Date		Valid from this date
HIDE_AFTER	Date		Expires after this date

To illustrate this approach, [an Excel spreadsheet \(saved as CSV\)](#) contains some data for quick import:

	A	B	C	D
1	TITLE	CONTENT	IMAGE_URL	CALL2ACTION
2	From small acorns...	... big plants grow! Read our tips from the experts about seed planting to ensure good growth potential!	https://classroom1.slgnt.eu/images/shared/cb/article-acorn.png	https://www.selligent.com
3	Falling leaves	Don't discard those swept leaves - they're great for plants! Let our experts explain how...	https://classroom1.slgnt.eu/images/shared/cb/article-leaf.png	https://www.selligent.com
4	Best shady locations	Take care of plants in extreme heat! Ensure they have some good shelter when needed.	https://classroom1.slgnt.eu/images/shared/cb/article-plant.png	https://www.selligent.com
5	Outdoor Plants	Don't take plants outside in cold weather: they need hardening off.	https://classroom1.slgnt.eu/images/shared/cb/article-pot-thin.png	https://www.selligent.com
6	Indoor Plants	Caring for plants indoors this winter? Here are some tips from the experts...	https://classroom1.slgnt.eu/images/shared/cb/article-pot-thick.png	https://www.selligent.com
7	Taking care of seeds	Seeds should always be stored in a cool dry place, and kept in the dark. Here are some tips for keeping moisture-free environments and ensuring your seeds last for years to come.	https://classroom1.slgnt.eu/images/shared/cb/article-seeds.png	https://www.selligent.com
8	Indoor tools	Our gardeners have reviewed a set of indoor tools for treating home plants. See which suit your needs!	https://classroom1.slgnt.eu/images/shared/cb/article-tools.png	https://www.selligent.com
9	Tree care	Read all about pruning back old branches and treating bark from our experts!	https://classroom1.slgnt.eu/images/shared/cb/article-tree.png	https://www.selligent.com
10	Dehydration concerns.	Dry soil grows hard and prevents water penetration. Here's some tips for keeping your ground soft and plants healthy.	https://classroom1.slgnt.eu/images/shared/cb/article-watering.png	https://www.selligent.com

5.2.3.2 THE DATA SELECTION

The Data Selection will specify this Data Selection List as its data source:

DATA SELECTIONS: PLANT_ARTICLES
1. Data selection - Provide a name and a source for your data selection

Name*

plant_articles

Data Source*

News Articles

With the relevant columns selected from this list:

2. Field selection - Select the desired fields and optionally provide an alias

Field	Alias	Usage ⓘ	Mandatory	Multivalue ⓘ
<input type="checkbox"/> ID		Read-only		
<input type="checkbox"/> CREATED_DT		Read-only		
<input type="checkbox"/> MODIFIED_DT		Read-only		
<input type="checkbox"/> TAXONOMY		Multiple values		
<input type="checkbox"/> LANGUAGE		Read-only		
<input checked="" type="checkbox"/> TITLE		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> CONTENT		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> IMAGE_URL		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> CALL2ACTION		Text	<input type="checkbox"/>	

Key field
+

Lastly, the number of articles to show in the repeater. If none of the articles are localised, the language omission box should also be checked (else all articles will be filtered out):

3. Filters - Provide the desired type of filtering

Sorting

+

Filter

+

Maximum number of items to display*

5

Matching

Audience field

Operator

Data selection field

Start typing to search for an audience field ...

 Don't send the message when there is no content for this data selection.

 Include items without a language.

 Use as a lookup data selection

5.2.3.3 THE CONTENT BLOCK

The Content Block ([plantopia-5b-article-repeater](#)) will present these details using Data Selection syntax (in a repeater), for example:

```
<h3>[% itemValue('TITLE') %]</h3>
<p>[% itemValue('CONTENT') %]</p>
<a href="[% itemValue('CALL2ACTION') %]"></a>
```

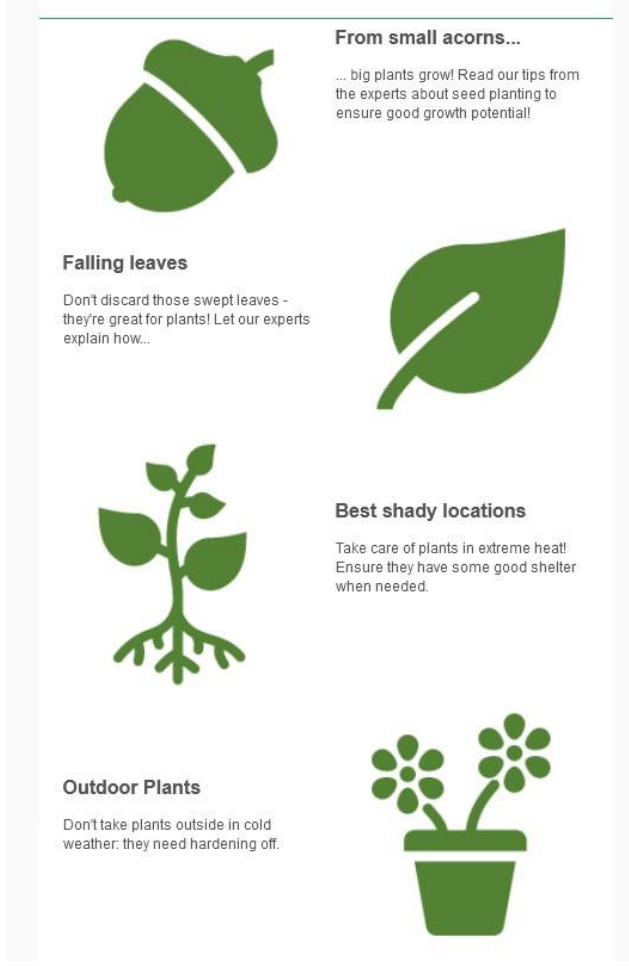
Note: each record is referenced using the `itemValue()` function, so is decoupled from the actual name of the repeater – so this Content Block can be used for all repeaters referencing those fields in the DSL.

The Content Block also uses conditional logic to switch left/right configuration for alternating rows:

```
<td dir="[% if( eq(mod(position(), 2), 0) , 'ltr', 'rtl' ) %]">
```

5.2.3.4 BRINGING IT ALL TOGETHER

The last component is a **Repeater** in the communication that uses the defined Data Source along with the Content Block to surface the content. The finished results will look something like:



Other than the order of presentation and limiting to top-N articles, there is no other control over which records from the Data Selection List will feature. This can be addressed in two ways:

- The addition of some visibility criteria, e.g.: SHOW_AFTER and HIDE_AFTER columns in the Data Selection List to allow a filter on the Data Selection that shows only items considered "in date"
- Using Templates to permit manual selection of specific articles by a marketer.

5.3 "FEATURED ARTICLE" HERO IMAGE

An extension to the previous idea is to combine all records for articles and hero images into one Data Selection List, then use one record as a "featured article" for the Hero Image with other records appearing further down the newsletter.

For completeness, the DSL should also take into account accessibility issues: each image not only needs a URL but also ALTERNATE text used to describe the image. This can be fixed with adding another field to the DSL:



NAME	TYPE	LENGTH	DESCRIPTION
IMAGE_ALT	Text	25	Describes the image

Next, the Content Block ([plantopia-5c-featured-article](#)) to present this Hero Image will differ slightly from the article content, surfacing these new fields appropriately, for example:

```
<a href="[% itemValue('CALL2ACTION') %]" alt="[% itemValue('IMAGE_ALT') %]">
 </a>
```

Note: to meet accessibility requirements, the ALT attributes should also be added to image placeholders in the article Content Block code.

5.3.1 DATA SELECTOR FOR THE HERO IMAGE

Finally, **two** Data Selections need to be created:



The first Data Selection (**hero_image**) picks a single record to use for the hero image:

DATA SELECTIONS: HERO_IMAGE

1. Data selection - Provide a name and a source for your data selection

Name*
hero_image

Data Source*
News Articles

2. Field selection - Select the desired fields and optionally provide an alias

Field	Alias	Usage	Mandatory	Multivalue
<input checked="" type="checkbox"/> ID		Read-only		
<input type="checkbox"/> CREATED_DT		Read-only		
<input type="checkbox"/> MODIFIED_DT		Read-only		
<input type="checkbox"/> TAXONOMY		Multiple valu		
<input type="checkbox"/> LANGUAGE		Read-only		
<input checked="" type="checkbox"/> TITLE		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> CONTENT		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> IMAGE_URL		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> CALL2ACTION		Text	<input type="checkbox"/>	
<input checked="" type="checkbox"/> IMAGE_ALT		Text	<input type="checkbox"/>	

Key field
+

3. Filters - Provide the desired type of filtering

Sorting
+

Filter
+

Maximum number of items to display*
1

Matching

Audience field Operator Data selection field

Start typing to search for an audience field ...

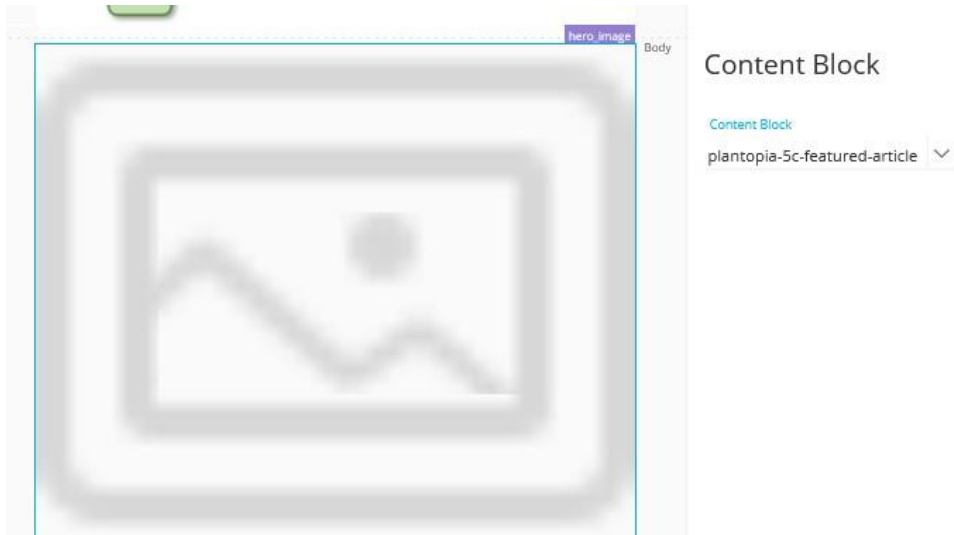
Exclude items from

- Don't send the message when there is no content for this data selection.
- Include items without a language.
- Use as a lookup data selection

In this case there's no filter or sort criteria that picks any such record, but only one record is fetched (selecting a specific record is discussed later). In the mail, the Hero Image consists of a repeater pointing to this Data Selector:



And then the new Content Block ([plantopia-5c-featured-article](#)) is added to a row within this repeater:



5.3.2 DATA SELECTOR FOR THE ARTICLE CONTENT

The second Data Selector is just a tweak to the original **plant_articles** filter that excludes the Hero Image:

3. Filters - Provide the desired type of filtering

Sorting

+

Filter

+

Maximum number of items to display*

5

Matching

Audience field	Operator	Data selection field
<input type="text" value="Start typing to search for an audience field ..."/>	<input type="text" value="v"/>	<input type="text" value="v"/>

Exclude items from hero_image

Don't send the message when there is no content for this data selection.

Include items without a language.

Use as a lookup data selection

5.3.3 WHICH FEATURED ARTICLE?

At present the second Data Selection ensures the record used for the featured article is hidden from the other articles, but the first selector has no criteria to determine which article will be featured.

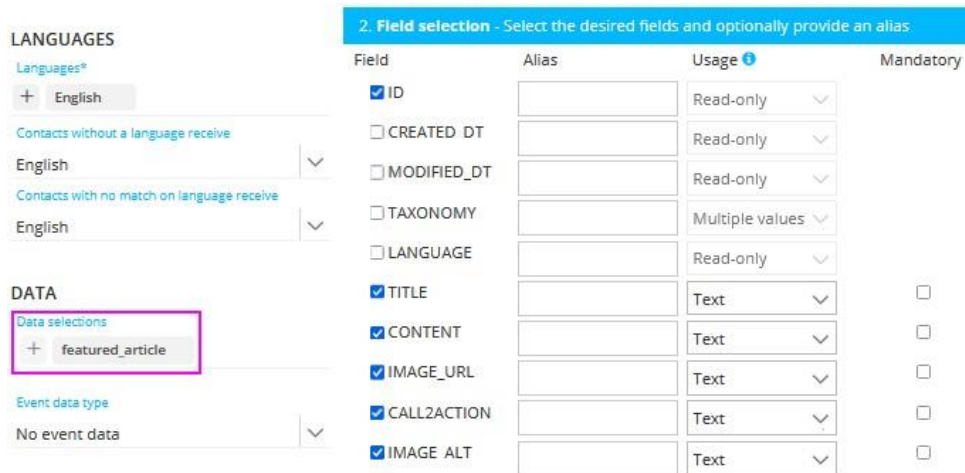
As only a single specific record is required, the repeater can be omitted entirely, and the record picked using the format:

```
[% itemValue('DS_Name' , ROWNUMBER , 'FieldName') %]
```

Where:

- *DS_Name* – name of the Data Selection
- *ROWNUMBER* – which record (zero-based) to choose from the Data Selector's results.
- *FieldName* – the (exposed) field in the Data Selector

Firstly, a **Data Selection** needs to be configured accordingly, for example:



The screenshot shows the configuration for a Data Selection. On the left, under 'LANGUAGES', there are two dropdown menus, both set to 'English'. Below that, under 'DATA', there is a 'Data selections' section with a '+' button and 'featured_article' selected. To the right, a table titled '2. Field selection - Select the desired fields and optionally provide an alias' lists various fields with checkboxes, aliases, usage types, and mandatory flags.

Field	Alias	Usage	Mandatory
<input checked="" type="checkbox"/> ID		Read-only	
<input type="checkbox"/> CREATED_DT		Read-only	
<input type="checkbox"/> MODIFIED_DT		Read-only	
<input type="checkbox"/> TAXONOMY		Multiple values	
<input type="checkbox"/> LANGUAGE		Read-only	
<input checked="" type="checkbox"/> TITLE		Text	<input type="checkbox"/>
<input checked="" type="checkbox"/> CONTENT		Text	<input type="checkbox"/>
<input checked="" type="checkbox"/> IMAGE_URL		Text	<input type="checkbox"/>
<input checked="" type="checkbox"/> CALL2ACTION		Text	<input type="checkbox"/>
<input checked="" type="checkbox"/> IMAGE_ALT		Text	<input type="checkbox"/>

Then fields from this Data Selection can be added directly to a Text Component without the use of a repeater. For example, to pick content from the *third* record (row number 2) from this Data Selection, use:

```
[% itemValue('featured_article',2,'CONTENT') %]
```

These lines can be added to a Content Block to surface a Hero Image plus Call to Action, for example:

```
<a data-link="Hero Image" href="[% itemValue('featured_article',2,'CALL2ACTION') %]"
  
```

Alternatively, the actual article (ROWNUMBER) could be a variable defined in the Content Block but set by the marketer:

```
<sg:var type="number" name="Chosen_article" value="1" />
```

Then this variable used to select the specific article, for example:

```
<a data-link="Hero Image" target="_blank" rel="noopener noreferrer"
style="text-decoration:none;cursor:default;"
href="[% itemValue('featured_article',[VARIABLE.Chosen_article],'CALL2ACTION') %]">
   </a>
```

Similarly, article content can be presented in the same Content Block, for example to show the title and content:

```
<h1>[% itemValue('featured_article',[VARIABLE.Chosen_article],'TITLE') %]</h1>
<p>[% itemValue('featured_article',[VARIABLE.Chosen_article],'CONTENT') %]</p>
```

The Content Block (e.g.: [plantopia-5d-selected-feature](#)) then displays an article number for the marketer to select:



Note: the value picked for **Chosen_article** is zero-based, and constrained by the Data Selection's **number of items**:



Consequently, if this number is set to 3 in the **featured_article** Data Selection, then only records 0, 1 and 2 can be specified for **Chosen_article**.

The email will then look something like:



In this case, clicking the Hero Image takes the reader to the target link for that particular article. To add a **Call To Action** button, first add a **tracked link** with the record URL for the target:



Then configure and style a button to use this tracked link:



Note: this technique to select a specific record *without* the use of a repeater and filter can be duplicated as a quick means of selecting multiple records: for example, record 0 for a Featured Item plus records 1 and 2 for two Product Recommendations. This avoids the marketer having to create three Data Selections and three repeaters, since the same Data Selection could be used with different ROWNUMBER values to present the record content.

Unfortunately, this technique to present record information from the Data Selection List without the use of a repeater **does not** permit the Data Selection to exclude this record from the article repeater (as seen in section C3.2)

5.4 DATA SELECTION LIST DESIGN

This raises the issue of the schema for the Data Selection List – which columns map to communication content? An example set of fields are:

- TITLE = text(20) - used for an article title, perhaps even the email subject for a featured article •
CONTENT = text(100) - content of the article
- IMAGE_URL = text(150) - path to the image for this article
- ALT_TEXT = text(150) - alternate text for this image (and title tooltip for a hoverover)
- CALL2ACTION_TEXT = text(50) - anchor text for a clickable link, e.g. "Get my 20% off voucher!"
- CALL2ACTION_URL = text(150) - actual target for the clickable link • SHOW_AFTER = DATETIME – optional fields to help determine visibility.
- HIDE_AFTER = DATETIME – e.g.: prevent a Christmas offer being shown the following year

However, the final set of columns will be heavily dependent upon a number of factors, including:

- the purpose and content of the communications
- intended business outcomes, goals of that email
- send frequency

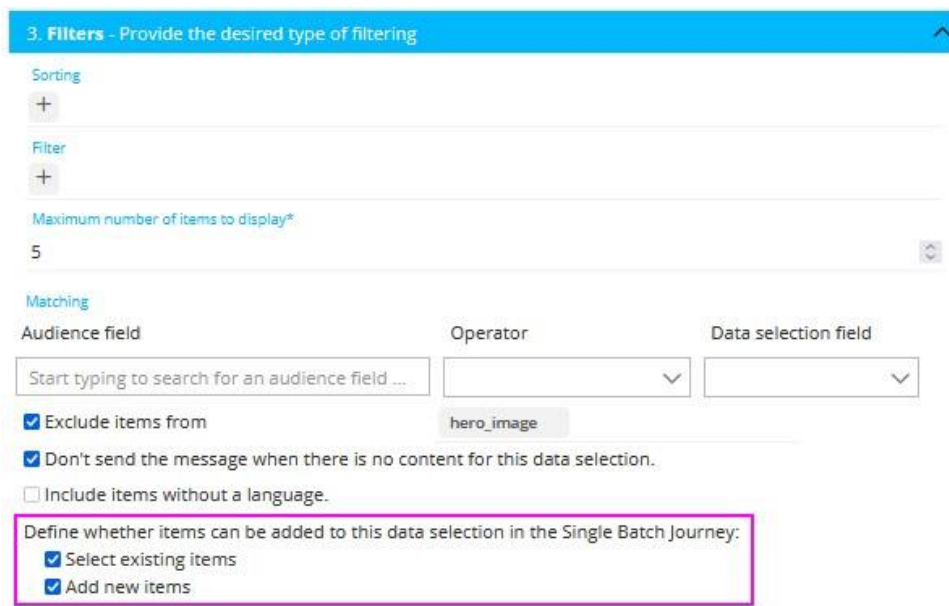
Reviewing prior communications should help guide the schema design, driving the choice of columns appropriately.

6 Using Templates

The previous techniques are suited to regular communications in which content is consumed from lists. For one-off mailings, a common approach is to duplicate an existing communication and amend to suit or [create a template from this design](#) to provide the same initial features.

6.1 TEMPLATE DESIGN

When converting the previous design to a template, additional options appear in the repeater:



3. Filters - Provide the desired type of filtering

Sorting
+

Filter
+

Maximum number of items to display*
5

Matching

Audience field	Operator	Data selection field
Start typing to search for an audience field ...		

Exclude items from **hero_image**

Don't send the message when there is no content for this data selection.

Include items without a language.

Define whether items can be added to this data selection in the Single Batch Journey:

- Select existing items
- Add new items

These allow a marketer to:

- Manually select specific items from the Data Selection List
- Add new ad-hoc items to the email (which will be created as new records in the Data Selection List)

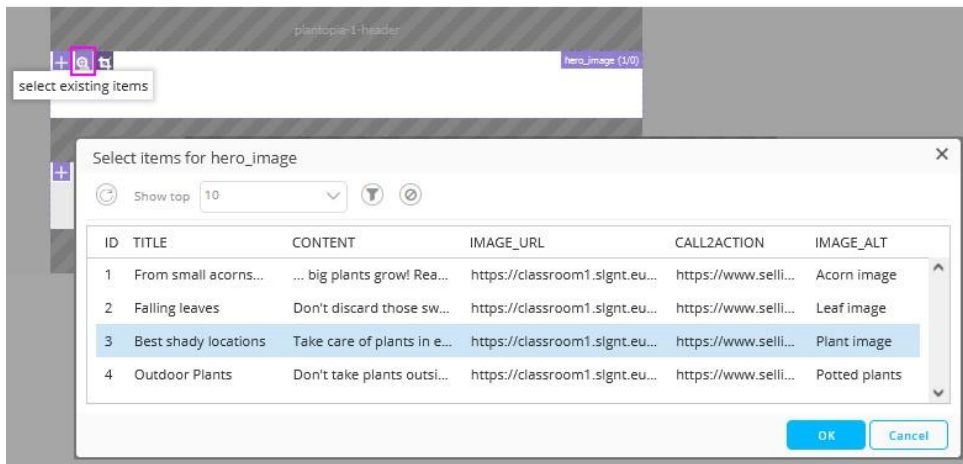
(Note: the option "Include items without a language" will be mutually exclusive to the lower options.)

Similarly, Content Blocks will be **locked** by default and thus cannot be changed from any setting made during the template creation. Right-click the content component menu to **unlock** the Content Block so that marketers can configure variables to their liking:

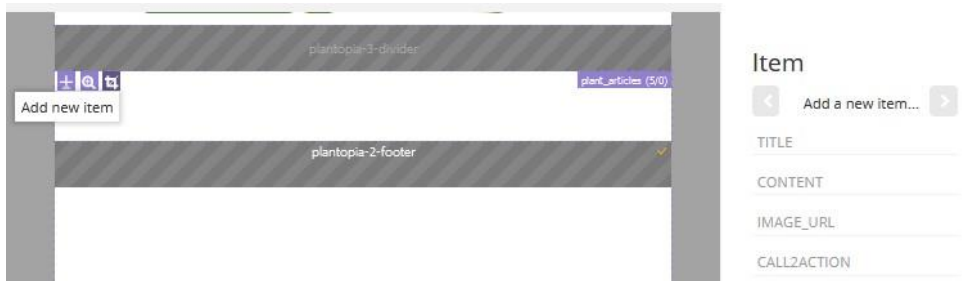


6.2 INSTANCE CREATION (FROM THE TEMPLATE)

When a [Single Batch Journey](#) is then created from this template, the **Edit Content** button allows the marketer to select the desired records for both Hero Image and Article Content:

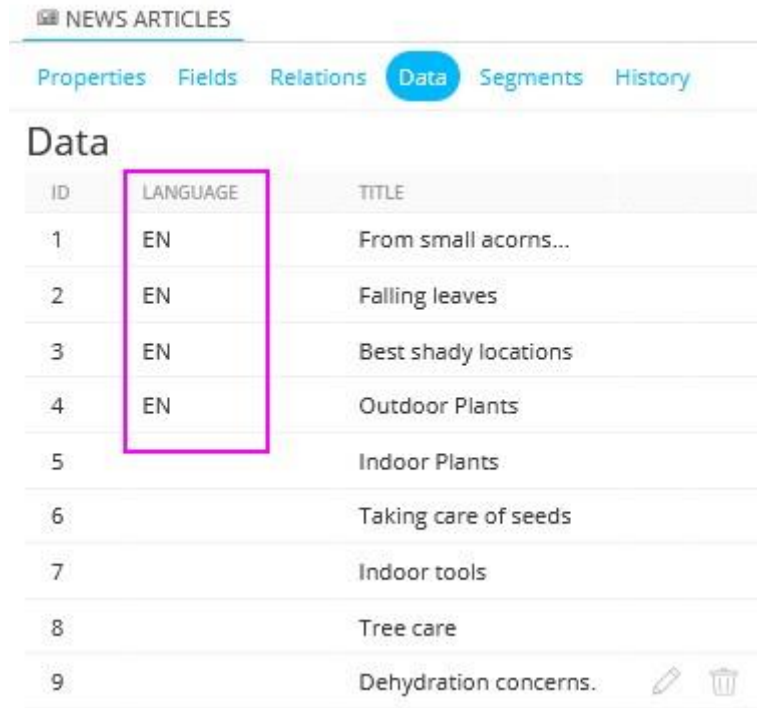




Alternatively, the + button allows a new article to be added simply by the marketer:



Using templates brings several issues to observe, in particular with **languages**:

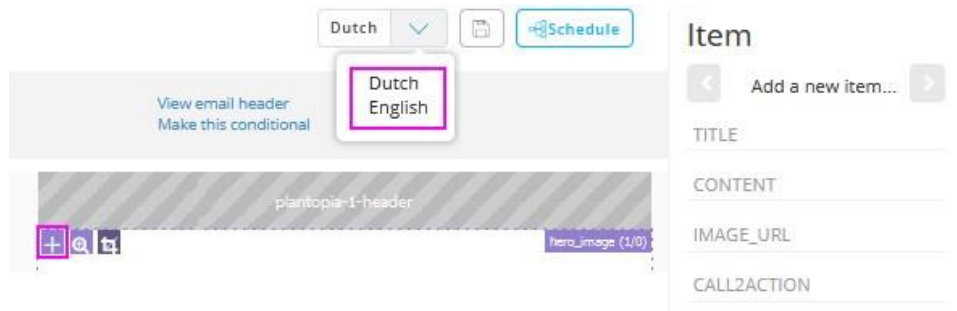
1. If using "select existing items" shows no records, then there could be a mismatch between the language of the asset and the language specified in the Data Selection List. Hence records in the Data Selection List will need their LANGUAGE field populated accordingly:



ID	LANGUAGE	TITLE
1	EN	From small acorns...
2	EN	Falling leaves
3	EN	Best shady locations
4	EN	Outdoor Plants
5		Indoor Plants
6		Taking care of seeds
7		Indoor tools
8		Tree care
9		Dehydration concerns.  

Without a language for each Data Selection List record, the item picker will show an empty list (as "Include items without a language" unticked will hide them)

2. New items added automatically pick up the language of the asset being used (displayed in the dropdown):



7 AB Designs

Although AB journeys may feature two to seven different designs (AB..G), the journey itself requires the assets to be completed and published in their entirety (multivariant testing is not supported).

Consider a design featuring similar content but (for example) testing a different hero image, for example:

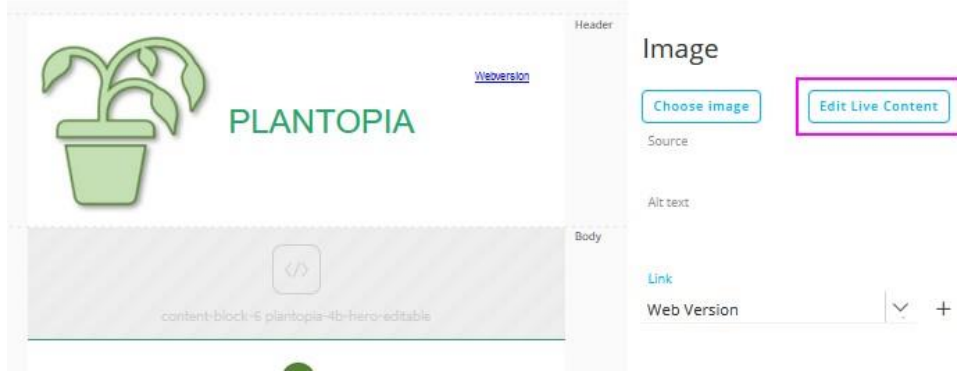
- A. A typical design using the techniques mentioned before
- B. A personalised Hero Image, using **Live Content** to include profile attributes
- C. Using **Smart Content** to personalise the Hero Image, based upon captured behavior

7.1 USING LIVE CONTENT

If Live Content has been provisioned on the platform, a Dynamic Image featuring some personalised text over an uploaded Hero Image can be provided, for example:



This was created simply by using the ([plantopia-3a-hero](#)) Content Block, but selecting **Live Content** then creating the appropriate Dynamic Image:



See other uses of [Live Content](#) in our [Feature Videos](#).

7.2 USING SMART CONTENT

For platforms with Marigold Recommendations integration, a further option is [the use of Smart Content](#) to show a recommendation based upon visitor behaviour:



The widget(s) will need to be created and configured in Marigold Recommendations beforehand, then surfaced using the **Smart Content** component, rather than the Content Block component.

An obvious benefit of this approach is that Marigold Recommendations embeds a tracked link to the product page in the Smart Content, making the personalised recommendation(s) clickable - so no need for a marketer to worry about adding links.