Creating Dynamic Emails

This guide explains how to use **Content Blocks** and **Display Rules** to create email templates with content that is displayed dynamically, based on any registration values, such as attendee type or registration status.

This feature is available to all Certain customers, and you don't need to do anything to "switch it on" – everything is already there, ready for you to use.

Contents

What can I do with dynamic emails?

You set up **Display Rules** to control what dynamic content is displayed in an email template. That content can include **Content Blocks** of HTML that you set up, and/or "**Confirm Sections**" (the sections that could be included in confirmation emails). These can all be in whatever order you choose.

So, for example, an email could display different content for different attendee types, such as including extra information for VIP guests, or only including a travel section in an email if the attendee has a travel reservation.

How do I build a dynamic email template?

Three Steps

To create a dynamic email template, follow these three steps:

1. Create a **Content Block**	Event Setup > **Content Blocks** or Account Settings > Management > **Content Blocks**	Pg. 2
2. Create a **Display Rule** which uses the content block and/or selected confirm sections.	Event Setup > **Display Rules**	Pg. 4
3. Create an **Email Template**, adding the display rule.	Communication > **Email Templates**	Pg. 6

Sending dynamic emails is no different to sending any other emails. For example, you can email several attendees by running a report, selecting the recipients in the **Report Results** window, and clicking **Compose Email** in the **Report Actions** section.

Adding a Content Block

To add a **Content Block** of HTML for use in display rules:
- For event-level content, go to **Plan > Event Setup > Content**.
- For account-level content, for use across multiple events without change, as an Administrator go to **Account Settings > Management > Content**.

Both pages look the same and work in the same way, except for some differences in which dynamic data fields are available. (Registration-specific fields such as attendee type aren't available at the account level, although profile-specific fields such as name and contact details *are*.)

The content blocks you add here can be displayed conditionally in emails, as determined by the rules you set up in **Display Rules**, as explained on page 6.

(They can also be used like any other dynamic data fields, since you can insert them directly in emails, forms, websites, etc., but that is not the subject of this guide – see the Page Help in Certain Platform.))
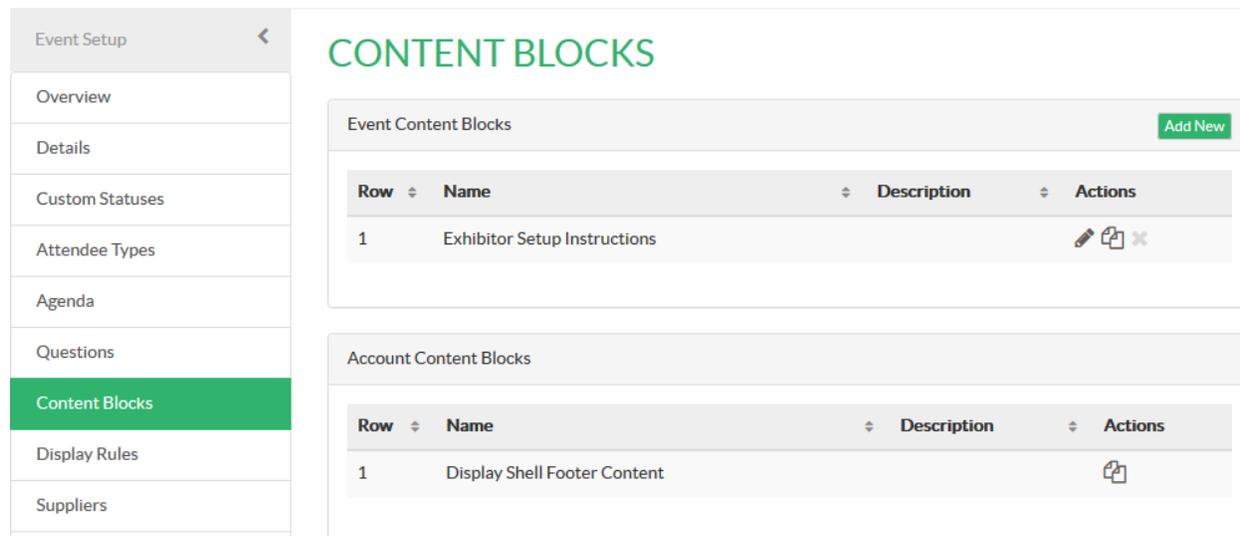

To add a new content block, click the **Add New** button to open the **Content Block Details** section illustrated overleaf.

1. Give the content block a unique **Name** and optionally an explanatory **Description**.

2. The **Text Above Header** is optional; for introductory remarks, for example. Click the **</>** icon below the box to edit the text in a pop-up HTML Editor window, if you prefer that to entering plain text or HTML code.

3. The **Header** (if any) is displayed above the body of the content block.

4. Type the **Body** of the content block in the unlabeled text box in the center of the page.

   The usual editing features are available unless the **Enable Editor?** check box is cleared. If you prefer to hand-craft the HTML code¸ you can clear that check box and edit the Body in a simple text box.

Just like when you are editing an email template, you can include dynamic information about the registration, event, or location in the body of the content block. Select a dynamic data field from the **Append** list and click the **Body** button to append that field to the block.

The fields available depend on whether you are configuring event-level or account-level content blocks. They may include, for example, Standard and Custom Profile Fields, Standard and Custom Registration Fields, Standard and Custom Event Fields, Location fields, and Other Fields. The example above includes the Event Name.

5. Click **Save** to save the block and return to the List of Content Blocks, or **Save & New** to save it and create a new one.
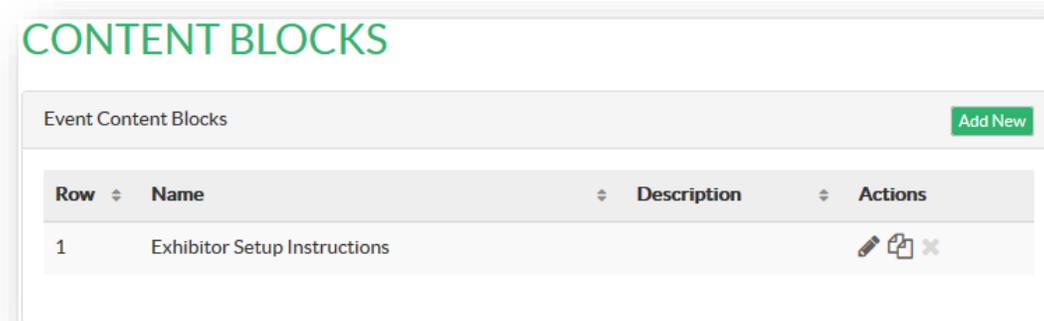
Editing and Copying Content Blocks

To **edit** a content block, click ✏ in the list of **Content Blocks**. This opens the **Content Block Details** section described above.

To **copy** a block, click 🗐, and edit (and rename) the copy in the **Content Block Details** section described above

Note: The Event Setup > Content Blocks page, as illustrated above on page 2, also includes a list of *account-*level blocks. Although you can't *edit* an Account Content Block there, you can *copy* it to the event level and edit the resulting new Event Content Block.

Adding a Display Rule

To add a display rule in an event, go to **Plan > Event Setup > Display Rules**.

On this **Display Rules** page, you configure **Display Rules** which you can add to email templates (see page 6). Each rule determines when selected **Content Blocks** and/or **Confirm Sections** are displayed in an email.

What are "**Confirm Sections**"? A Confirm Section displays a summary of that part of an attendee's registration, as it would if selected as a section of the Confirmation page of a registration form (on Plan > Forms > Confirm). For example, if you select the **Confirm Section: accommodation** to be displayed along with a Content Block of accommodation-specific text, the details of the attendee's room reservations are displayed inline in that part of the email. This avoids having to display the entire registration confirmation at the bottom of the email.

Click **Add New** to add a new display rule in the **Display Rule Details** section which opens.

1. Under **Display Rule Details**, give the rule a unique **Name**.

2. Setting up display rules here is like setting up Logic Rules in forms.

Rule Conditions

3. Under **Rule Conditions**, select the radio button: **Apply ONLY if these conditions are met**
   - The conditions begin with an IF.
   - Select a **question/data field**, a **comparison operator**, and an **answer value**.
   - *Example:* IF 'Attendee Type Name' = 'Exhibitor'

   - You can make the condition multi-faceted by adding 'AND' and 'IF' conditions at the end.

Rule Action

4. In the list of **Available Sections**, select the **Confirm Section(s)** and **Content Block(s)** to be displayed in the email if the rule is met, and click **->>** to move them into the list of **Active Sections**
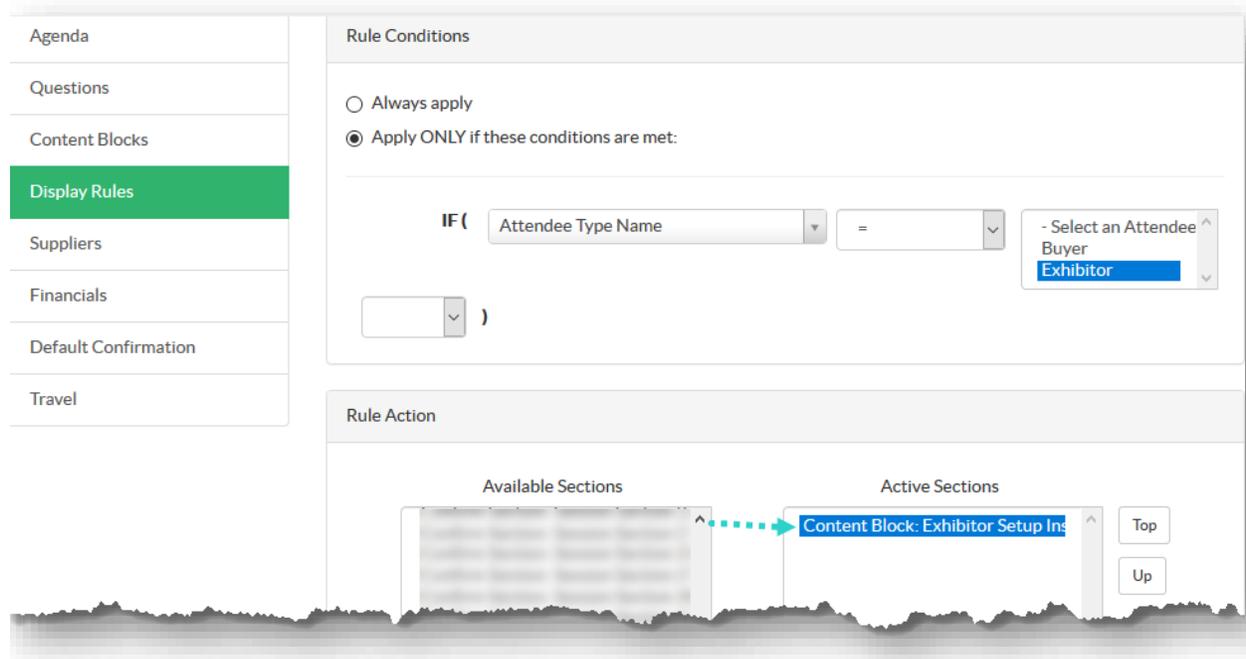
5. If necessary, adjust the order of the Active Sections by clicking **Top** / **Up**, **Down** / **Bottom**.

Adding a Display Rule to an Email Template

When you have saved your display rule, it is available for you to add to an email template, just as if it were a dynamic data field. To do so,

1. Go to **Plan > Communication > Email Templates**.

2. Click **Add New** to add an email template, or ✎ to edit one.

3. Place your cursor in the email at the point where you want to add the display rule.

4. Scroll down towards the end of the **Append** drop-down list and select the display rule.

5. Click the **Message** button.
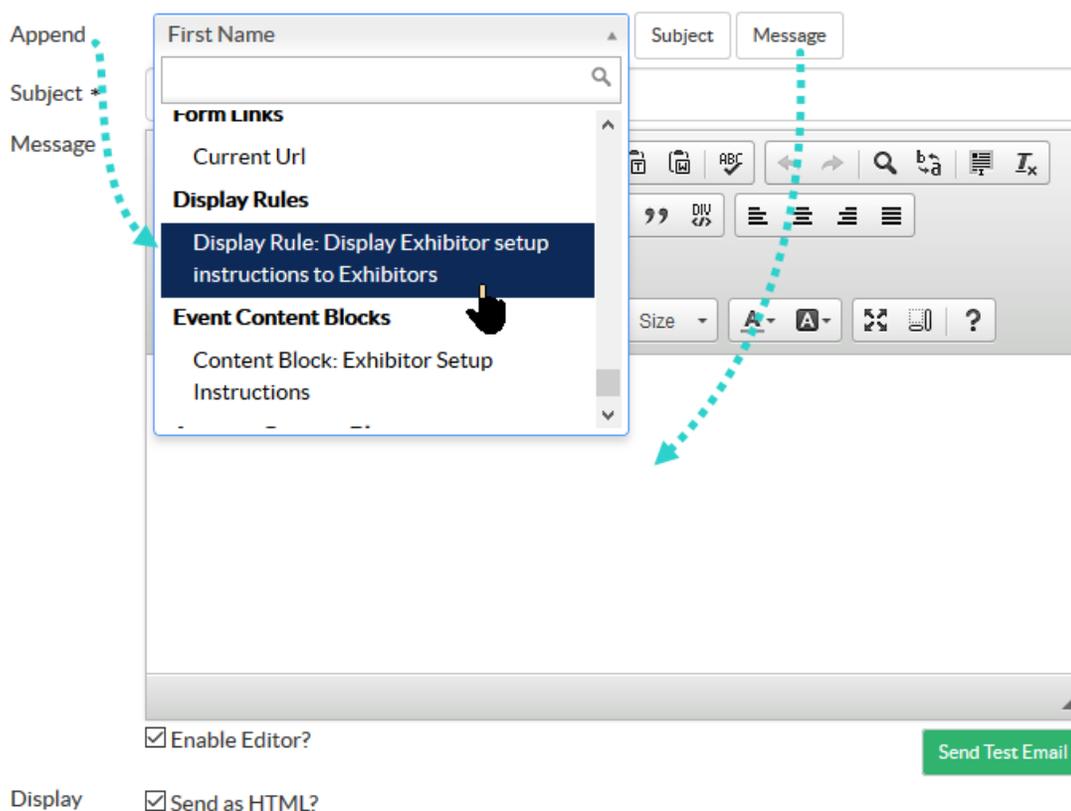
6. **Save** the email template.

The display rule is now part of the message. When you send an email based on that template, it will contain the relevant text for that attendee if the rule is met.

A NOTE ABOUT COPYING AN EVENT

When you copy an event, content blocks and display rules are *not* copied to the new event, so you need to set up new ones there if necessary. (This may change in a future release.)

Account content blocks are of course available for use in the copied event if it was copied to the same account.