

What are Content Rules and how to use them?

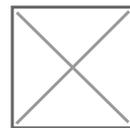
Content rules allow users to add dynamic content to email messages by mapping it relative to the recipient information from the Datamart.

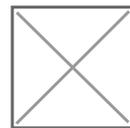
What is the difference between Content Rule and Content block?

- The immediate difference is the way these two types of variables are displayed on the HTML document.
 - **##Variable##** (content rule variable)
 - **###Variable###** (content block variable)
- A Content Rule applies to the whole email and allows for 1 conditional rule to affect multiple variables in the message. A Content Block is a single condition and a single variable affecting a single block or object in the message.

*I will explain the entire process by creation of a new email message with content rules applied

- Go to Compose > Email Message > Create new message > Standard > Details.
- In Details tab, click yes for Content Rules label. (This will turn on adding content rules properties to email).



- Add all other information needed for email message and click .
- Since, this document primarily focuses on content rules, we will jump straight to the **HTML** tab.
- Here, the user could add their own HTML code with a small addition (**Very important**):
- Since, content rules map code snippets to dynamic variable, we will create a dynamic variable. For example: **##offer_header##**
- Look at the example below for usage:



Here, three highlighted dynamic variables will be used to add specific code snippets according to recipient information stored under corresponding fields.

- Save the HTML code and generate a Text version.
- Click on **Content Rules** tab.
- At the bottom of page, following buttons are displayed:



Users can build rules manually or select a value quotes .csv file with content rules for corresponding dynamic variables

- We will go over building rules manually first.
- Select **Build rules manually** button.
- **Important:** the email message must have dynamic variables which could be used for content rules. Otherwise, a warning message will be displayed. User will not be allowed to access this property.



After selection of Build rules manually, the window is displayed (shown above).

1. **Edit criteria as text:** This provides users the freedom to write the rules from scratch for content rules. On the other hand **edit as builder** provides an interface for users to simply select the values and hides all the coding technicality. Example:

Think of criteria as an IF/ELSE statement which results in application of underlying expression.

- **Define criteria:** Clicking on this option will allow us to create a new criteria for defining content rules for data.
- **Default rules:** When none of the criteria matches with the record in the Datamart then this final rule will be applied.

Edit criteria as Builder:



Edit criteria as text:



1. **Variable Name:** This provides a list of all the dynamic variables we created in our HTML document. The Content section provides us with a text area to add code snippet/ text/ images etc. based on the users preference which will be displayed in the final email message according to the criteria selected.
2. **Copy Criteria from Rule:** CONNECT makes it easier for using previously defined criteria as a template to create new ones.
3. **Cancel:** If the user is not satisfied with the criteria defined, by simply clicking this option it will discard that specific content rule.
4. **Done:** Clicking this option will create the content rule.

After content rules are defined, the User will be brought back to this screen:



CONNECT allows users to remove all the rules by simply clicking on the Clear rules button. Also, the rules could be exported as a value quoted .csv file for future use.

HTML

```
"Criteria","header1","body1","image1"  
"(field[Division] equals "Food Services")","15% Off All Gloves","We have a wide selection of  
gloves for the food services industry. FDA approved. wrist and elbow length.", "<a  
href="https://www.uline.ca/Grp_367/Vinyl-Poly-Gloves?keywords=Poly+Food+Service+Gloves"  
target="_blank" title="Glove Sale"></a>"  
"(field[Division] equals "Cleaning Services")","15% Off All Mops","Check out our new line of
```

```
microfiber mops! Wet mops, dry mops, dust mops. We have everything in stock", "<a
href="https://www.uline.ca/Grp_123/Mops-Squeegees-Carts?keywords=mop"></a>"
"_Default", "15% Off Sale!", "For the largest selection of cleaning supplies at unbeatable
pricing check our monthly flyer for the best deals.", "<a
href="https://www.uline.ca/Promotion/Specials"></a>"
```

Once the content rules are defined, we can test them in the preview section. A complete example from step 1 is shown below:

Add dynamic variables to HTML code map add content rules:



After defining the content rules:



In the preview tab.

When no input is provided in email:



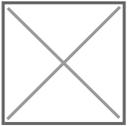
When Division is equal to "Food Services":



When Division equals "Cleaning Services":



When none of the criteria match we use the rules defined in default section:



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