

#### **Getting Started**

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Engage Premier entered an End of Sale (EOS) period effective June 10, 2024. Existing Segment customers will continue to have access and support to Engage Premier until an end-of-life (EOL) date is announced. We recommend exploring the following pages in preparation of a migration or future MCM needs:

Twilio Marketing Campaigns

Preferred ISV Partners:

Airship Blog

Bloomreach Blog

Braze Blog

Insider Blog

Klaviyo Blog

Use Twilio Engage to build email templates with a *what you see is what you get* (WYSIWYG) Drag and Drop Editor. Use drag and drop tools to design the template layout and include user profile traits to personalize the message for each recipient.

You can navigate to the Drag and Drop Editor from the **Select Editor** screen:

When you build a new email template or edit an existing one.

From a Send Email step in a Journey.

From the Select Editor screen, select Drag and Drop Editor and click Build Email.

The Drag and Drop Editor consists of a left sidebar with design modules and an email canvas.

### Left sidebar

The left sidebar contains the following tools:

Content

Blocks

Body

**I**mages

Uploads

Click and drag the tools you want to use from the left sidebar in the email canvas.

#### **Email canvas**

Use the canvas to organize and preview the email template for both desktop and mobile. Drag and drop content modules from the sidebar into the canvas and arrange the layout as desired.

Select content in the canvas and return to the left sidebar to set properties for the selected content.

# **Design for desktop or mobile**

Navigate between desktop or mobile to design the email template for both formats. Toggle between desktop or mobile in the left sidebar or use the buttons in the bottom right corner of the email canvas.



Mobile view doesn't contain all design options that are available for desktop. For example, upload image capabilities are only available when you edit for desktop. However, content that you add for desktop will also display for mobile devices by default. See content modules for more on content that's only available to edit for desktop.

#### **Responsive design**

Use responsive design settings in the sidebar to hide specific content for either desktop or mobile.

#### **Add content modules**

Select from the following content modules:

MODULE

DESCRIPTION

MODULE	DESCRIPTION
Columns	Adds columns to the email body. After you place a column in the email canvas, use the left sidebar to set column and row properties, as well as responsive design settings.
	Columns allow you to organize the email layout by adding sections to drop other content modules in, such as buttons or images.
Button	Use this tool to add a button to the canvas, then edit button properties in the sidebar:
	<b>Action</b> : Use the Action Type dropdown menu to select the action that occurs when the button is clicked. Learn more about link actions.  Action properties can only be set when you edit for desktop.
	Button Options: Select button text and background color along with the width and alignment.
	Spacing: Set spacing and border attributes for the button.
	General: Adjust the container padding to determine the amount of space between the button and column border.
	Responsive Design: Hide the selected button for desktop and mobile.
Divider	The divider separates columns, rows, or content in the email with a visible divider line.
Heading	Adds heading text to the email. Set text properties, add actionable links, and personalize the text with merge tags.
HTML	Use this tool to add HTML to the email body. Note that you can only add HTML when you edit for desktop.
Image	Adds an image. You can format image properties and add a link. Image uploads are only available when you edit for desktop.
Menu	Adds a responsive menu to the email. After you add a menu to the canvas, edit the following properties:
	Menu Items (desktop only)
	To add menu options: 1. Click <b>Add New Item</b> .
	<ol> <li>Enter the menu text.</li> <li>Select the action type that occurs when you click on the menu option.</li> </ol>
	Styles: Menu style for font, layout, padding, and more.
	General: Properties for the menu container padding.
	Responsive Design: Hide the selected menu for desktop or mobile.
Text	Adds a text section to the email. Set text properties and include actionable links. Add merge tags to personalize the email with user profile traits.

# Add blank columns or predefined content blocks

Use the Blocks tool to add both blank columns and pre-existing content blocks to the email. Drag empty column blocks in the canvas to organize the layout, then drag and drop content tools inside the column blocks.

Predefined content blocks allow you to add content such as:

Unsubscribe blocks

Heading blocks

lmage blocks

Saved blocks

# **Email body attributes**

Use the body tool to apply general style and link attributes to the entire email canvas.

Email body attributes include:

Text and background color

Content width and alignment

Font family

Link color and underline



To modify style attributes for specific content in the email, select a content block in the canvas and edit attributes in the left sidebar.

## Add an image

Use the images tool to add images to your email. Scroll through available images in the left sidebar or use the search tool.

Select and drag and image into the canvas, then return to the sidebar to set image properties:

IMAGE PROPERTY	DESCRIPTION
Image	Upload a new image (up to 10 MB), add an image url, and adjust the image width. You can also add alternate text to display with the image.
Action	Use the image link drop-down menu to select link actions that occur when a recipient clicks on an image.
General	Adjust container padding, which determines the amount of space between the image and column border.
Responsive Design	Hide selected images for an email viewed on either desktop or mobile.

## Upload an image

Use the Uploads tool to upload an image for the email template. Click **Upload Image** to select an image stored locally or drag and drop images in the sidebar dropzone.



The maximum image file size you can upload is 10 MB.

#### **Link actions**

Use the **Action Type** drop down menu in the sidebar to select the action that occurs when a recipient clicks on the link, button, or image in the email template.

Select from the following link actions:

**Open Website**: Directs you to a website. Enter a URL and choose to open the website in the same tab or a new one.

**Send Email**: Sends an email based on the email recipient, subject, and body you enter.

**Call Phone Number**: Makes a phone call to the number you enter.

**Send SMS**: Sends an SMS message to the phone number you enter.

### **Add unsubscribe links**

It's always best practice to include an unsubscribe link in the emails you build. Engage adds an unsubscribe link to templates, which you can edit at any time. For more on email unsubscribe links, view SendGrid's best practices.

Add an unsubscribe link as a button:

Select the button in the email canvas and navigate to Action settings in the left sidebar.

**2**et Action Type to **Open Website**.

**Blick Special Links > Unsubscribe**.

Add an unsubscribe link to text:

- Select the text that you want to convert to an unsubscribe link.
- Lick the link icon in the text toolbar.
- **3.** the Insert/Edit link window, set Action Type to **Open Website**.
- **Click Special Links > Unsubscribe**, then click **Save**.

You can alternatively add a predefined unsubscribe link content block.

## Add a manage preference link

Engage also adds a manage preference link to templates. The manage preference link lets your customers opt in and out of email groups on an individual basis instead of unsubscribing from all your campaigns. For more information, see subscription groups.

## Personalize with merge tags

Add merge tags in the Drag and Drop Editor to personalize your message with user profile traits.

- Select any heading or body text in the email canvas. From the text toolbar, click Merge Tags.
- **Select** the profile traits to include from the drop down menu.
- Based on cursor placement, Engage adds merge tags to your email template.

Engage supports liquid templating to create dynamic content in the email design editor and the SMS editor.

For example, use {% if %}, {% elseif %}, and {% else %} tags to call a product by name if known, or use a default message:

```
{% if profile.traits.product_title == "Sneakers" %}
Hey, view our latest sneakers!
{% elsif profile.traits.product_title == "Sandals" %}
Hey, check out these sandals!
{% else %}
Hey, check out our latest footwear.
{% endif %}
```

To view more examples related to your use case, visit the LiquidJS docs.

#### **Content validation**

For all content editors in Engage, you'll see alerts for any issues in your template, such as invalid profile traits or incorrect liquid syntax. Engage both flags template issue(s), and displays recommended next steps. While you can save these templates, you must fix any issues before using them in Engage campaigns.

## Save the template

After you design the email, click **Create Email Template**.

## **Next steps**

Learn more about building email templates to include in your Engage campaigns.

You can learn about the HTML Editor for both code and visual editing capabilities from a single view.

A

once you create an email with the Drag and Drop Editor, you can't modify it with the HTML Editor, and vice versa.

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