Floe200

Step-by-Step Guide for Trial Users

Contents

Viewing Email Types and Categories

Email types are defined in the back-end development system and are grouped together in categories. To view the existing email types or add a new email type:

Logon to SAPGUI

Enter SPRO in the command prompt

Select Cross Applications > General Applications>Floe

Select Maintain Email Types

Note the email types and category referred to in your Trial Email.

Add a new email type if required and assign to an existing category

Save the changes

Getting started with Email Builder

Open the URL link supplied within your Trial Licence email to launch Email Builder. Email Builder enables you to manage email content. From the 'Manage Emails' view, you can select an email type to create or modify.

Use the header bar search facility to either Search for an email type by name/id or to Sort the list.

If the email has a ⚠ warning symbol is shown under 'Not Maintained', no content has been added to the email.

Select the email type and if this is the first time an email type is selected, add:

Template.

(This is a boilerplate template, defined in the backend that sets the email width and other generic look and feel characteristics with css) The boilerplate is only defined in the default language.

Email language

The default language is initially set as the default system language

Both the template and language can be changed once the email type has been opened in Manage Emails.

The Email Builder screen is made up of 5 areas:

Text Blocks
Adding text, images, links, special characters and horizontal lines
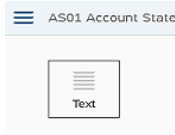

From the left hand Block Panel drag the **Text** icon into the Content View and drop it on *Drop New Content Here*.

In the bottom of the split screen area the Rich text editor is displayed. Using the editor, add text to the block and format the content using the formatting options.

TIP: Text can be copied in from existing emails using cntl-c and changes can be reversed using cntl-z. Close block with the **X** on the right hand side and save the changes made using the Save icon on the Header bar
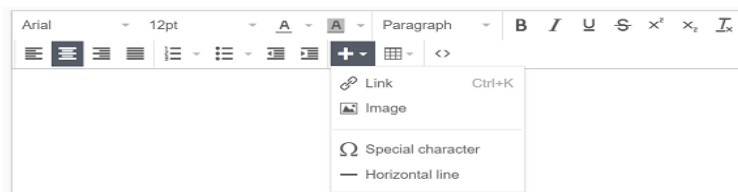
To view the content added in HTML format, click the **<>** button.
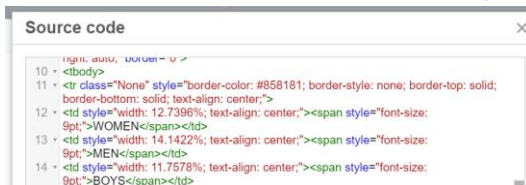
Add an **image** by clicking the **+**, select image and add the *url address* or http address of the image. Change the size of the image to fit within the email.
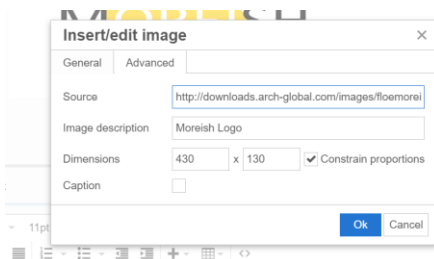

A link can be added by highlighting the text and adding a url address. The caption will appear under the image, but is not required.

TIP: Resize your image before linking to it in Floe2.
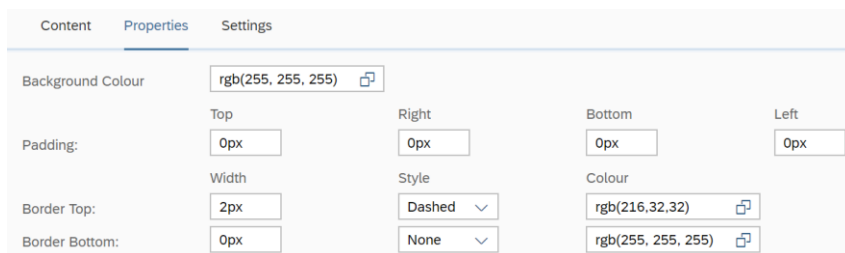
Select the *Settings* tab

Add or change the name and description of the block. The details changed are updated when you save the email. If your text box contains a repeating data, such as a table with repeating order row, toggle the Repeatable Block on.
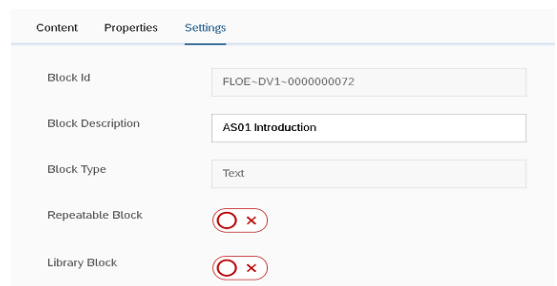
Select the *Properties* tab

Change borders, background colour and padding for the outline of the block.

Click on the close icon ✕ to close the Text editor screen

Adding tables

To add a **table**, drag and drop a text block into the content View area. Click the table button and define the columns and rows for the table
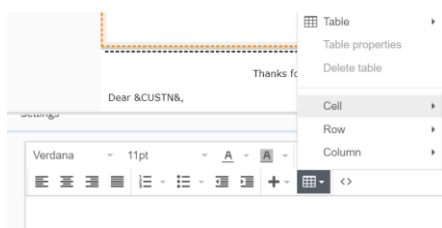
Use the cell, column and row functions to change the formatting for an area of the table.

Hover over the table to display the table menu bar
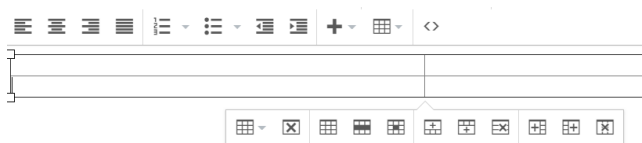
Click on the table, row or cell button to change the format. The general tab   is displayed. Change the Alignment, Height and Class on the General tab.

Click on the Advanced Tab

The border style, colour and background colour selections are displayed. These can be manually updated in this tab. The Style input can be updated and any valid CSS can be added. See w3schools on how to use CSS.

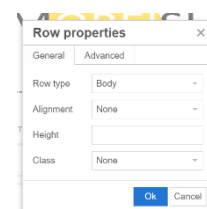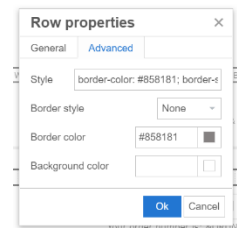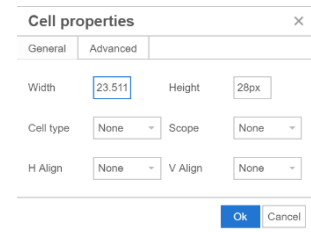Change the width and height of each cell by dragging the cell border to the required size. For more accurate dimensions, click on the table to highlight the table menu and select cell properties to add a width and height in pixels.

Tip: If the CSS changes are not reflected or your table doesn't appear as expected, click on the HTML source button <> to change the generated HTML code.

Adding variable placeholders

Variables are used as placeholders for values that are pre-populated from a user-exit. Variables can be added to Text or Code blocks and are set using an & on either side of the variable name. Any name can be used and referenced in the generated user-exit

Dear &CUSTN&,

Your order &ORDN& has been received and is being processed.

Variables added to a block can be tested using the Trigger Email Variables

Code Blocks
Adding pure HTML code

Code blocks are pure HTML block. Use a code block if you have already created an HTML email in an earlier version of Floe, or have an existing HTML email that you wish to use within Floe.

From the Block panel, drag the *Code block* icon into the Content View and drop it on *Drop New Content Here* or above/below other content.

In Content Editor, add new HTML code, by typing the start of the code. The HTML code prompter will be displayed. Select the code required from the options available.

Copy and paste any existing HTML code into the code block to reuse the code in a Floe200 email.

HTML code blocks can be maintained through the Email Builder app or through the back-end. To update the code in the backend, follow steps [1], [2] and [3] here

TIP: When adding new code, start with HTML5 and add the code to create a body for the HTML email.

Separator Blocks

Adding a line or space between email blocks

Separator blocks a space or a line between two content blocks.

Select the separator block from the Block Panel and drag and drop the block into the Content View area, noting the blue link for the location of the block.

Select the separator block to display the editor section.

Library Blocks

Adding/editing a library block

Library blocks are blocks that are created to be used across multiple email types and are saved in the library. Library block can be created and edited within Manage Emails and Manage Library areas.

To add a library block in Manage email click on the library block icon. A list of existing library blocks is shown. The Search/Sort function can be used to locate a specific block or order the list.
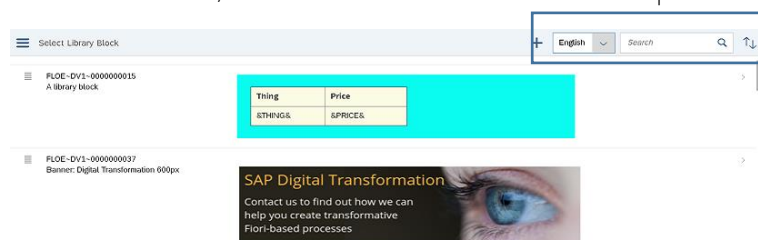
Drag and drop the chosen library block into the Content area.

Select the *Properties* tab for Text or Separator library blocks to change the styling (borders, background colour and padding)

Select the *Settings* tab to change the Block Description or change the block from a Library Block to a block that is editable in Email Builder. Toggle the Library Block flag to off and the block will be available for edit. When the Library Block flag is turned on then the block will be added into the library the next time the email is saved.
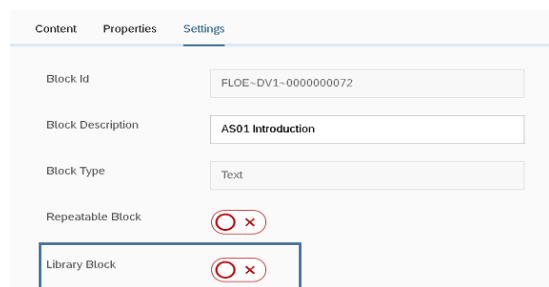
Tip: If you make changes to the block in Email Builder, the block is *copied* leaving the original version unchanged. This creates a ne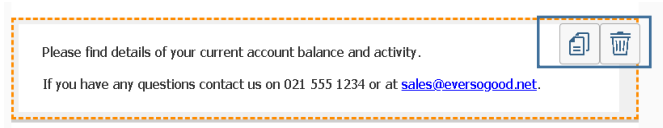w version of the blocks in the Email Library, leaving the library block unchanged so that other emails using the same block are not affected.

To change the block for all emails without creating a copy, see *Manage Library*.

Moving, editing and adding additional blocks

Multiple blocks can be added in any order to the Content View.

When the block has been added to the Content View area, it can be copied, deleted or moved to a new position using drag and drop.

Select the block to be changed, which will be outlined in red. The editor section will be displayed in the lower half of the screen.

Select or hover over a block to display the copy and delete buttons in the right corner.

To move the block, drag and drop the highlighted block to the required location which is shown by a blue line.
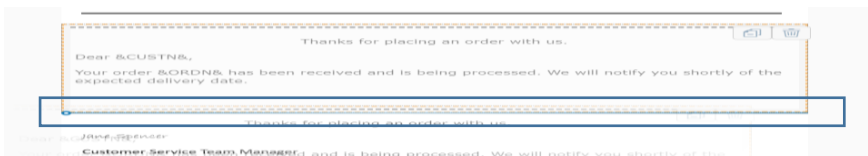
Content View

The Content View shows the changes made in the Content Editor. To view more of the Content View, click on the double slider line. Use the arrow keys to resize the screens or scroll to move the line up and down as required.


TIP: The Content View does not show all content as in the email. Some changes such as colours can only be seen in the Preview. See Preview for more details.
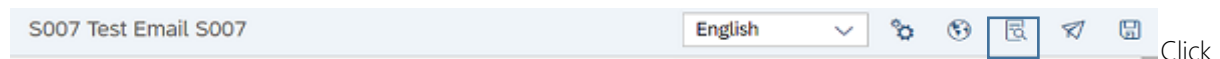
Saving changes

Changes made to the content in the Content Editor is not auto-saved. Save the changes as required and before Previewing or exiting from Floe2

Click the **Save** icon on the Top Menu bar

Preview

S007 Test Email S007 ... English ... Click
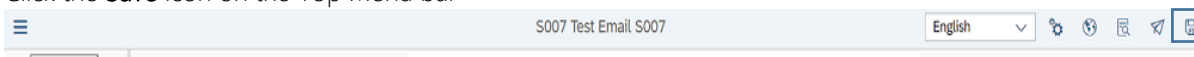
Changes made in the Content Editor become dynamically visible in the Content View as changes are made. Some changes are not shown in the Content View. The Preview button on the header bar to see a preview of the changes made to the content, The Preview shows the blocks as they will appear in the email. The preview displays the HTML content and changes to colours, padding and margins which may not appear in the Content View.

Changing the email subject and addresses

S007 Test Email S007 ... English

The email settings button allows you to change the template, the email subject, the sender address, which is normally a system email address and select whether to save the email body and attachments.

| Settings	
Template	Floe Template 600px
Email Subject	Customer email S007
Sender Address	e6r@arch-global.com
Save Email Body	✓ O
Save Attachments	O ✕

Changing the email language

S007 Test Email S007 ... English

Translating, creates a new version of the email. Using the dropdown, you can select the language to edit and then translate the content of the email to a new language.

After translating the email, select the required version to edit from the drop-down. The languages that have already been created are displayed.

Manage Library

Manage Emails
Manage Library
Test Trigger ... Manage Library ... Properties ... Settings
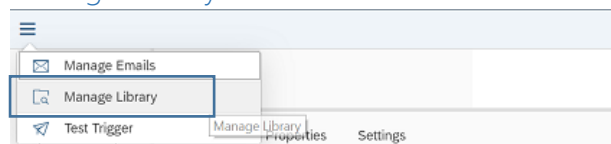
Library blocks are blocks that are created to be used across multiple email types. Library blocks typically include email headers with company logos, company footer logos, signature blocks and blocks with links to social media. They are not restricted in their use and so may be used for example for a header block with employee details/customer details.

Library blocks can be created or changes while editing an email, *see Adding/changing a library block* in an email or in the Manage library view. The block types can be 'text', 'code' or 'separator'. The steps to add each of these blocks in Manage Emails can be followed in Manage Library.

When a block is edited in the library, changes are applied directly to the block, affecting all emails that include the block. Save the changes made to each library block.

Select the properties tab for Text or Separator library blocks to change the styling (borders, background colour and padding)

Select the settings tab to change or view the id, name and the 'library block' indicator. If this is turned on then the block will be added into the library the next time the email is saved.

When the library block indicator is set the content and properties of the existing library block cannot be changed, except through the Manage Library view.

Text, Separator and Code blocks can be added to the library. Library blocks types are used and created as in the Manage Emails view.

Click on the block in the Content View to display the Content Editor and Tabs.

Blocks created in the library can only be deleted when the library block has not been assigned to an email type. The Where Used List tab appears when a library block is assigned to one or more email types.

Click on the Where Used List tab in the Content Editor to see a list of all email types containing the selected block.

Click on the Translate icon to translate the language of the library block being viewed. Select the correct language from the language drop-down

Click on the Clone icon to create a copy

Testing an email

The Test Trigger view is used to run Floe to generate an email output to send a test email to a nominated safe recipient, add test values to replace your variables or to preview the test email in Floe.

Test Trigger can be selected by:

Clicking on the trigger icon on the Header bar in Manage Emails.

Selecting Test Trigger option on the Menu drop-down list
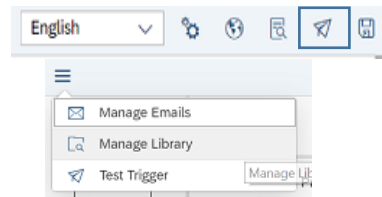
TIP: Before selecting trigger email, the email must be saved so that the current version of the email is sent or previewed.

Settings

To send a test email, compete the details on the settings screen.

The email recipient must already have been added to the safe recipient list. Step [6]

These are the same parameters as in the back-end transaction /FLOE/TEST_TRIGGER. When triggering the email in the production environment


Variables

To test the email using sample values, add in the variable name used in the email without the &. The row and Parent row are used for repeating rows. The values added to the table will be displayed when the Preview is selected. To prepopulate the email with variables, read about the Email Data User-Exit.

	Name	Value	Row	Parent R...
☐	FNAME	Chris		
☐	ITEM	1	1	
☐	ITEM	2	2	

Preview

Click on Preview to view the emails with the sample variable
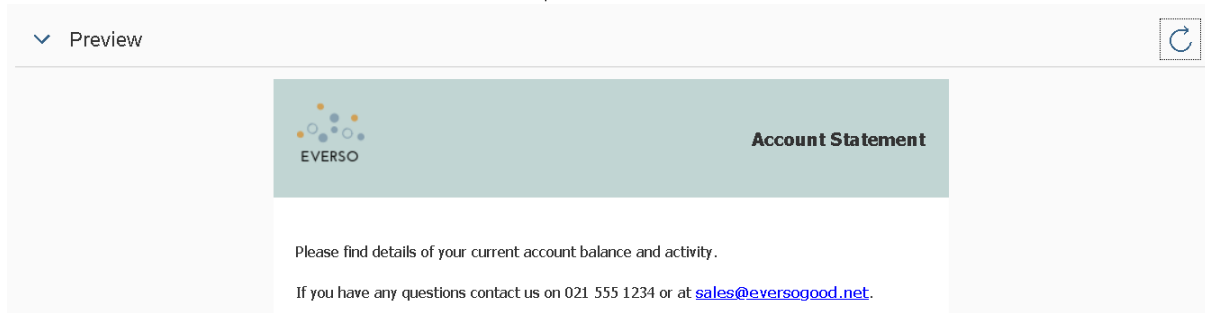
Text and Separator blocks have properties for styling (borders, background colour and padding)

Floe integration
To learn how to add a Floe email to an existing Varo process click here

Examples
Click here to navigate to the Floe Wiki to view examples