



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

## CX Contact Help

[Create an Email Template](#)

---

## Contents

- 1 Create an Email Template
  - 1.1 Create Message Content
  - 1.2 Personalize Message Content
  - 1.3 Add an Unsubscribe Link

# Create an Email Template

## Important

The content of this document has been moved and is no longer being updated in this location.  
For the latest content and most recent updates, see the [CX Contact Help](#) on the Genesys Multicloud site.

If you plan to run a campaign using the email channel, you can build and modify email templates in CX Contact. This page explains how.

To get started, you need to [create an Email dialing profile](#)

When you set up your email profile, you'll see a tab named **Content**. This is where you'll create the email content and specify all associated parameters.

New Email Dialing Profile "New Email"

General Dialing Treatment **Content** Advanced

All fields marked with an asterisk (\*) are required

Email General Template

General Script with support for Unsubscribe

\* Type

General

Labels

Choose Label

To begin, specify the following general information:

- Type - **General** is the only option. (Future releases will include support for additional types of Email templates).
- Labels - If you plan to personalize messages using fields you defined in a labeling schema, select the labeling schema here. Otherwise, the Personalization menu will populate the default CX Contact list fields. See the [Personalized Content](#) section below for more information.
- From - Specify the sender's email address.

## Create an Email Template

---

- Reply to - Specify the email address that accepts responses to the original email.
- Subject - The text that appears in the subject line of the email. This text can be **personalized**.
- Enable Friendly Options - If you enable friendly options, you can specify easily identifiable names in the **To**, **From**, and **Reply to** fields. The text in these fields can be **personalized**.

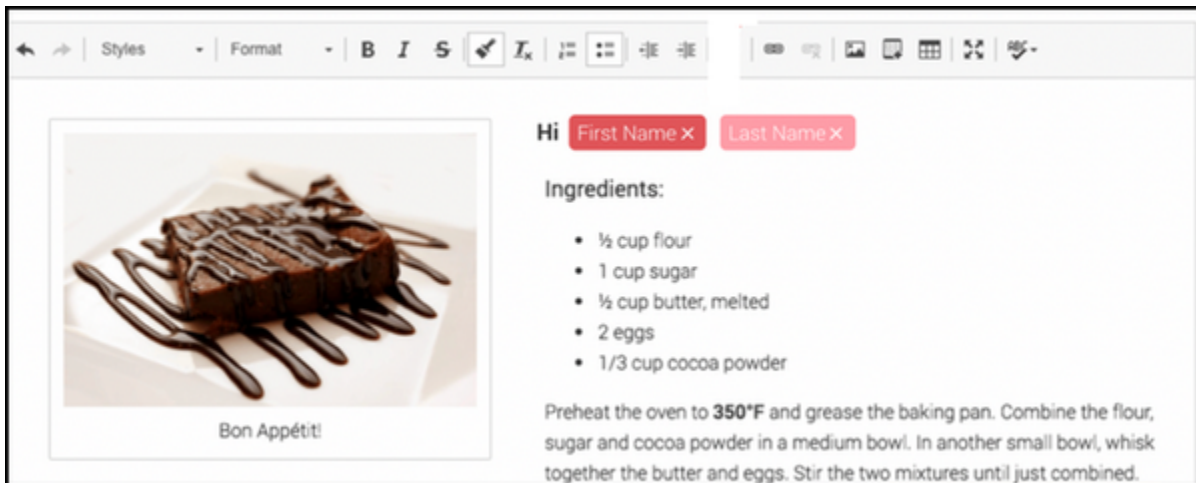


## Create Message Content

You have two options for creating email content: use the visual editor to create and format all message content or upload an HTML file containing the message content.

### Visual Editor

To use the visual editor, set the **Use Visual Editor** switch to the **On** position. The visual editor box appears onscreen, enabling you to create and format text and graphics.



### HTML File

To upload an HTML file containing the message content, go to **Browse for HTML -> Select File**. Two new options appear onscreen:

---

- Preview - Used to view the message content contained in the HTML file.
- Send Test Email - Used to confirm that the email can be successfully delivered and received.

## Personalize Message Content

You can personalize message content in the following sections of an email:


- In the subject line
- When using 'friendly' options - the **To**, **From**, and **Reply to** fields
- In the body of an email

The instructions for adding personalized content to a body of a message depend on whether you're using the visual editor to create content or importing an HTML file that contains the content.

### Visual Editor

To personalize content when using the visual editor:

1. Select the **labeling schema** from the Labels menu.
2. From the Personalization menu, drag the contact list field name tag to the body of the message.

<b>Scenario</b>	<p><b>Action:</b> You write: <i>Hi</i> followed by the <i>First Name</i> tag:</p>  <p><b>Result:</b> The system scans the contact's information and finds that the <i>First Name</i> value for this contact is John. The customer receives the following email message: <i>Hi John</i></p>
-----------------	--

### HTML File

Personalizations in imported HTML

To personalize the content in an imported HTML file, use the following format: tag `<t>` and attribute `value`. The value must contain the exact name of the value from the list of allowed send attributes.

#### Examples:

- `<p>Lorem <t value="$first_name">First Name</t> ipsum</p>`
- `<p>Lorem <t value="$first_name"></t> ipsum</p>`
- `<t value="$first_name"></t>`
- `<t value="$first_name"/>`

## Add an Unsubscribe Link

To provide customers with the option to unsubscribe from your mailing list:

1. Set the **Enable Unsubscribe** switch to the **On**.
2. Provide the Unsubscribe Confirmation page **URI**.  
Once the **Enable Unsubscribe** switch is set to ON, an additional **Unsubscribe page link** personalization becomes available in the personalizations list.
3. Include the **Unsubscribe page link** personalization to your email template. For example, "To unsubscribe follow this link: < Unsubscribe Page Link >."

### Important

It is the user's responsibility to provide the Unsubscribe page content, hosting and unsubscribe functionality.