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## CX Contact Help

[Create an Email Template](#)

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# Create an Email Template

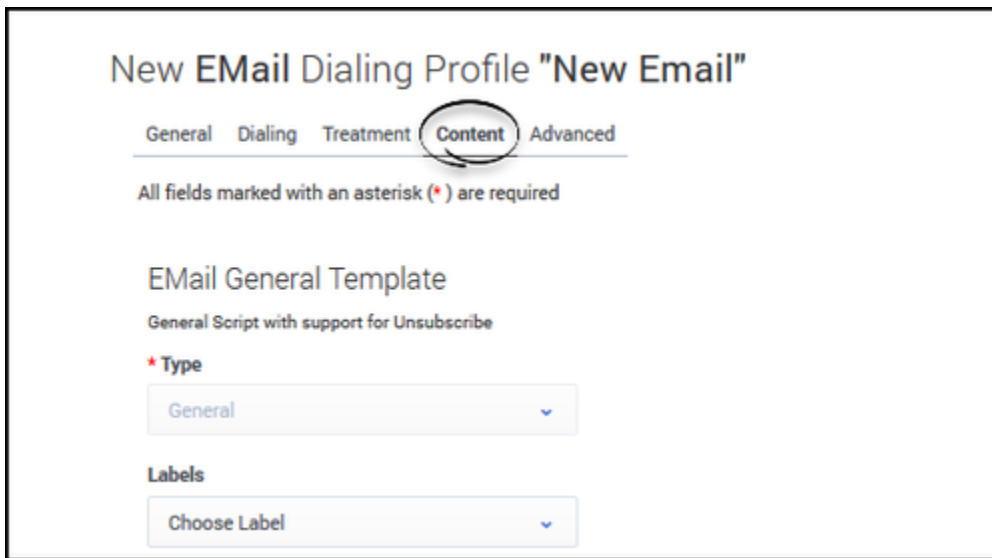
## Important

The content of this document has been moved and is no longer being updated in this location.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.



The screenshot shows a web interface for creating a new email dialing profile. The title is "New EMAIL Dialing Profile 'New Email'". Below the title are five tabs: "General", "Dialing", "Treatment", "Content", and "Advanced". The "Content" tab is selected and circled. Below the tabs, a note states: "All fields marked with an asterisk (\*) are required". The main section is titled "Email General Template" and includes the subtitle "General Script with support for Unsubscribe". There are two required fields: "\* Type" with a dropdown menu showing "General", and "Labels" with a dropdown menu showing "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

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- 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**.



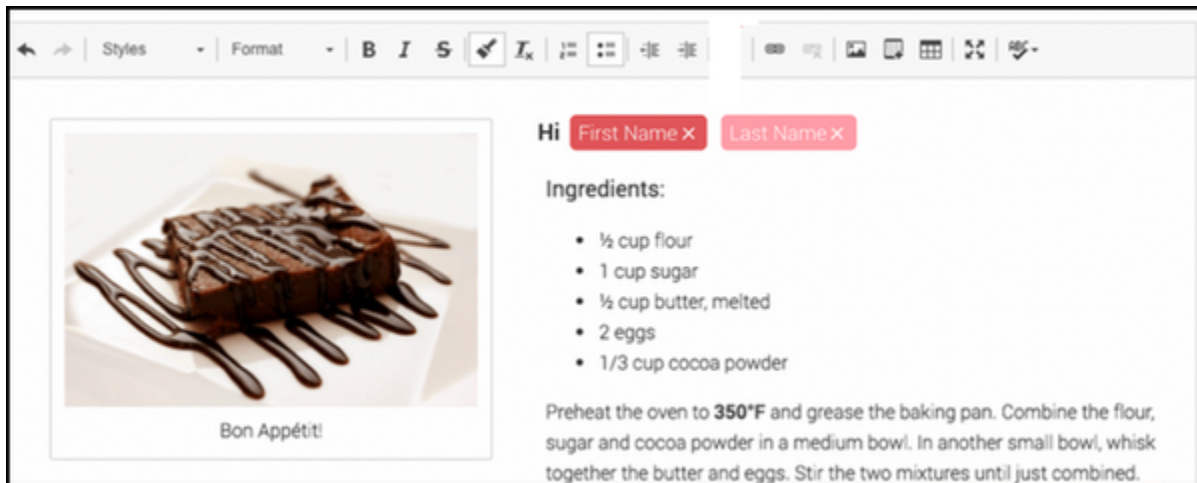
The screenshot shows the 'Labels' section with a dropdown menu set to 'GU Training'. Below this is a section titled 'Enable Friendly Options' with a yellow smiley face icon and a green 'On' toggle switch. Underneath, there are three input fields labeled 'To', 'From', and 'Reply To'. Below these fields is a 'From' section with a red dot icon, a text input field containing 'info', an '@' symbol, and a dropdown menu set to 'genesys.com'.

## 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.



The screenshot shows the Visual Editor interface. At the top is a toolbar with icons for undo, redo, styles, format, bold, italic, strikethrough, link, unlink, bulleted list, numbered list, indent, and outdent. Below the toolbar is a preview area. On the left is an image of a chocolate brownie with chocolate sauce drizzled over it, with the text 'Bon Appétit!' below it. On the right is a text area containing a greeting 'Hi' followed by two red placeholder boxes labeled 'First Name x' and 'Last Name x'. Below the greeting is the heading 'Ingredients:' followed by a bulleted list: '• ½ cup flour', '• 1 cup sugar', '• ½ cup butter, melted', '• 2 eggs', and '• 1/3 cup cocoa powder'. At the bottom is a paragraph of text: 'Preheat the oven to **350°F** and grease the baking pan. Combine the flour, sugar and cocoa powder in a medium bowl. In another small bowl, whisk together the butter and eggs. Stir the two mixtures until just combined.'

### 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.