


Unite Education Program v6.5

Job Aid: 5651

Add Dynamic Content to an Email Message

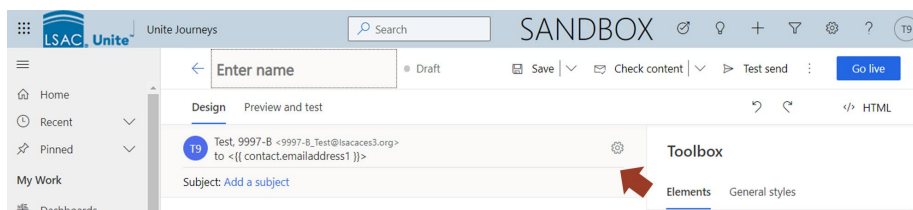
In Unite, you can use dynamic expressions to personalize emails before they are sent. If you use a dynamic expression for dynamic content, Unite places a value that can change based on the context where you use the message. The value may be different depending on where you use the message and who receives it. The steps for adding a dynamic expression for dynamic content differ depending on whether you want to add the expression to the email header or add the expression to a text element in the email body.


To add dynamic content to the email header

1. Open a browser and log on to Unite.
2. On the main menu, click JOURNEYS.
3. On the navigation pane, click **Marketing emails**.
4. Click  to create a new email or select an existing email from the list.
5. Verify you are on the *Design* tab.
6. Click the email header.

Note

The email header includes the subject of the email message along with other general settings.



7. In the *Email header* properties panel, place your cursor in the **Subject** field where you want to add dynamic content.
8. Click .
9. On the *Content assist* window, verify **Dynamic content** is selected.
10. From the **Select entity** list box, select the entity containing the data you want to insert.

Note

Most content comes from the **Contact** entity, which is associated with the person record and the **Content Settings** entity, which is associated with communication preferences and contact details.

Note

If you want to insert data from an application record or a user-defined field, you must add a for-each loop.

11. From the **Select relationship** list box, select the relationship between the entity and the merge field.



Note

Most of the time, you select **No relationship**.

12. From the **Select field** list box, select the merge field you want to add to the email header.
13. Click .

Note

Unite adds a dynamic expression and personalizes the **Subject** just before sending the message to a specific individual.

14. Click .
15. Click  to close the email record.

To add dynamic content to a text element in the email body

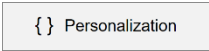
1. Open a browser and log on to Unite.
2. On the main menu, click JOURNEYS.
3. On the navigation pane, click **Marketing emails**.
4. Add or open an email record.

Note

If you add an email record, you can start with a system template or a custom template added by a Unite user from your school.

Note

If you open an existing email record, ensure the record is in draft status before making edits.

5. Verify you are on the *Design* tab.
6. Place your cursor in the text element where you want to add dynamic content.
7. Click  .
8. On the *Content assist* window, verify **Dynamic content** is selected.
9. From the **Select entity** list box, select the entity containing the data you want to insert.

Note

Most content comes from the **Contact** entity, which is associated with the person record and the **Content Settings** entity, which is associated with communication preferences and contact details.

Note

If you want to insert data from an application record or a user-defined field, you must add a for-each loop.

10. From the **Select relationship** list box, select the relationship between the entity and the merge field.

Note

Most of the time, you select **No relationship**.

11. From the **Select field** list box, select the merge field you want to add to the text element.

12. Click  .

Note

Unite adds a dynamic expression and personalizes the email body just before sending the message to a specific individual.

13. Click  .

14. Click  to close the email record.

Related resources

- 5744 - Open an Email Record
- 5592 - Add an Email Record
- 5313 - Edit an Email Record