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Creating a Communication Template

Josh Nye
2 years ago · Updated

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Use this guide for guidance in creating predefined templates in customers' contact log.

1. Go to Settings, Business Settings, Comm. Templates.

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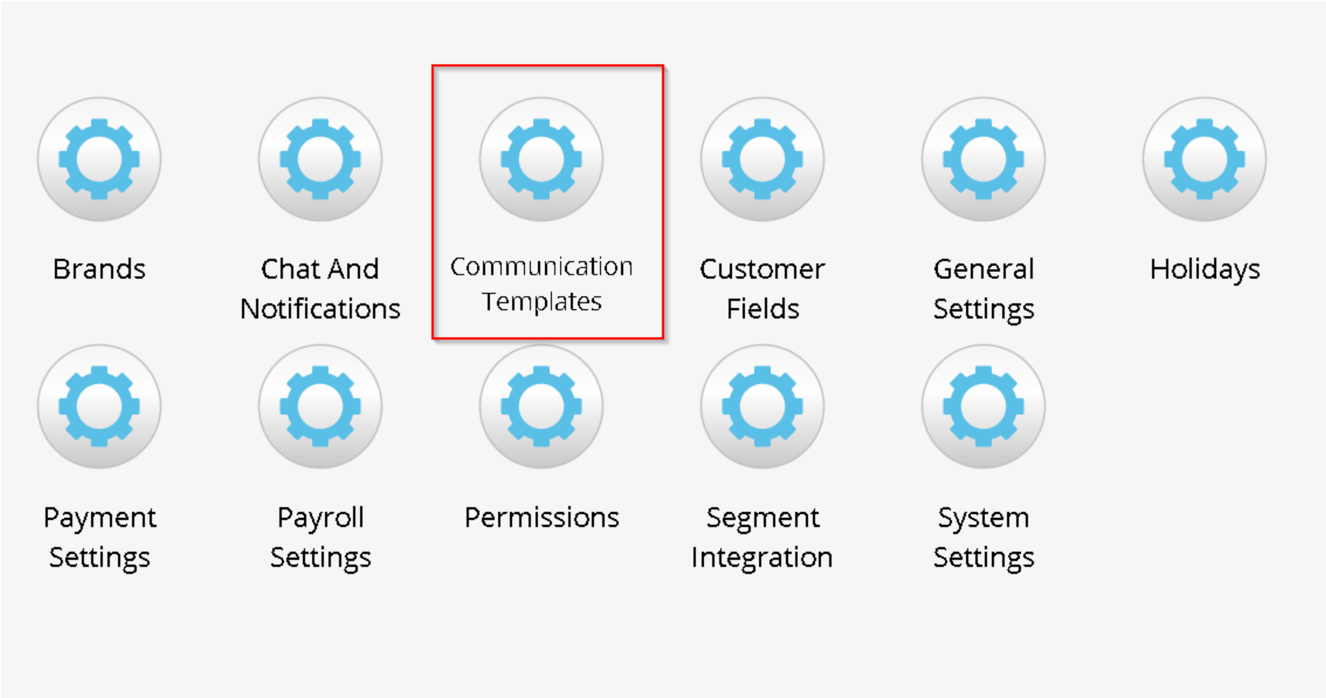
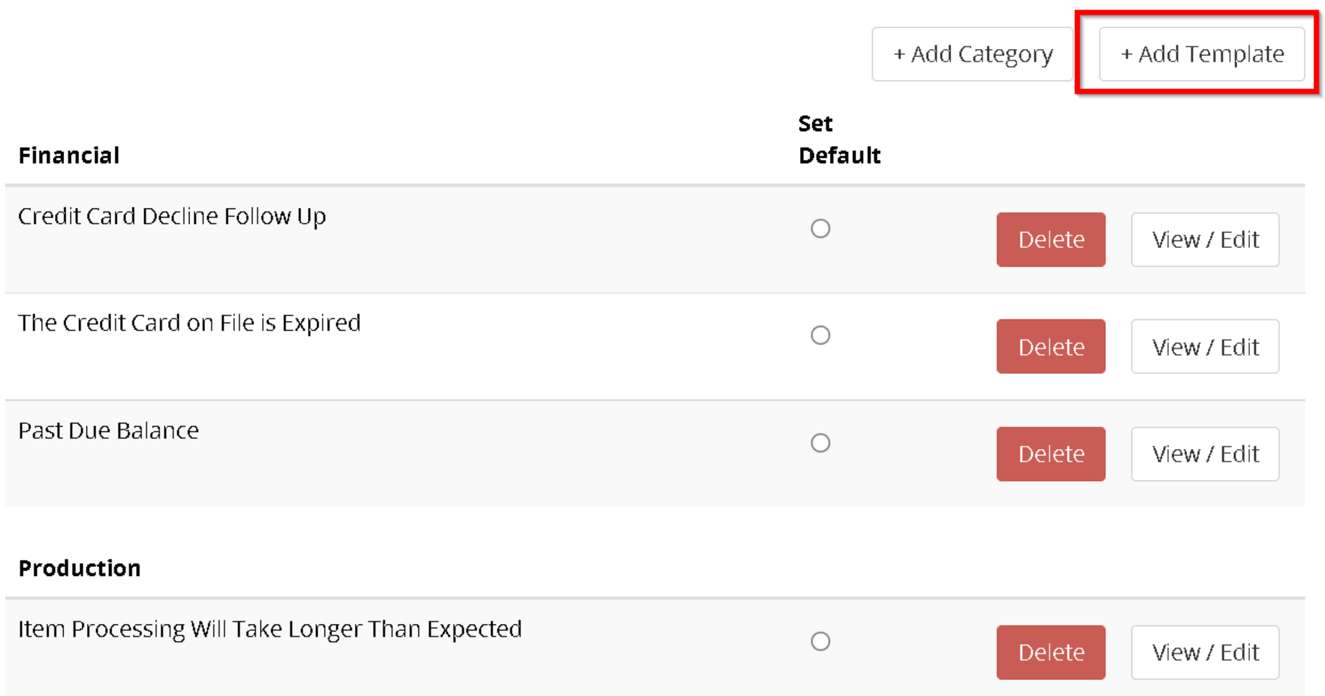


2. To add a new template click Add Template.

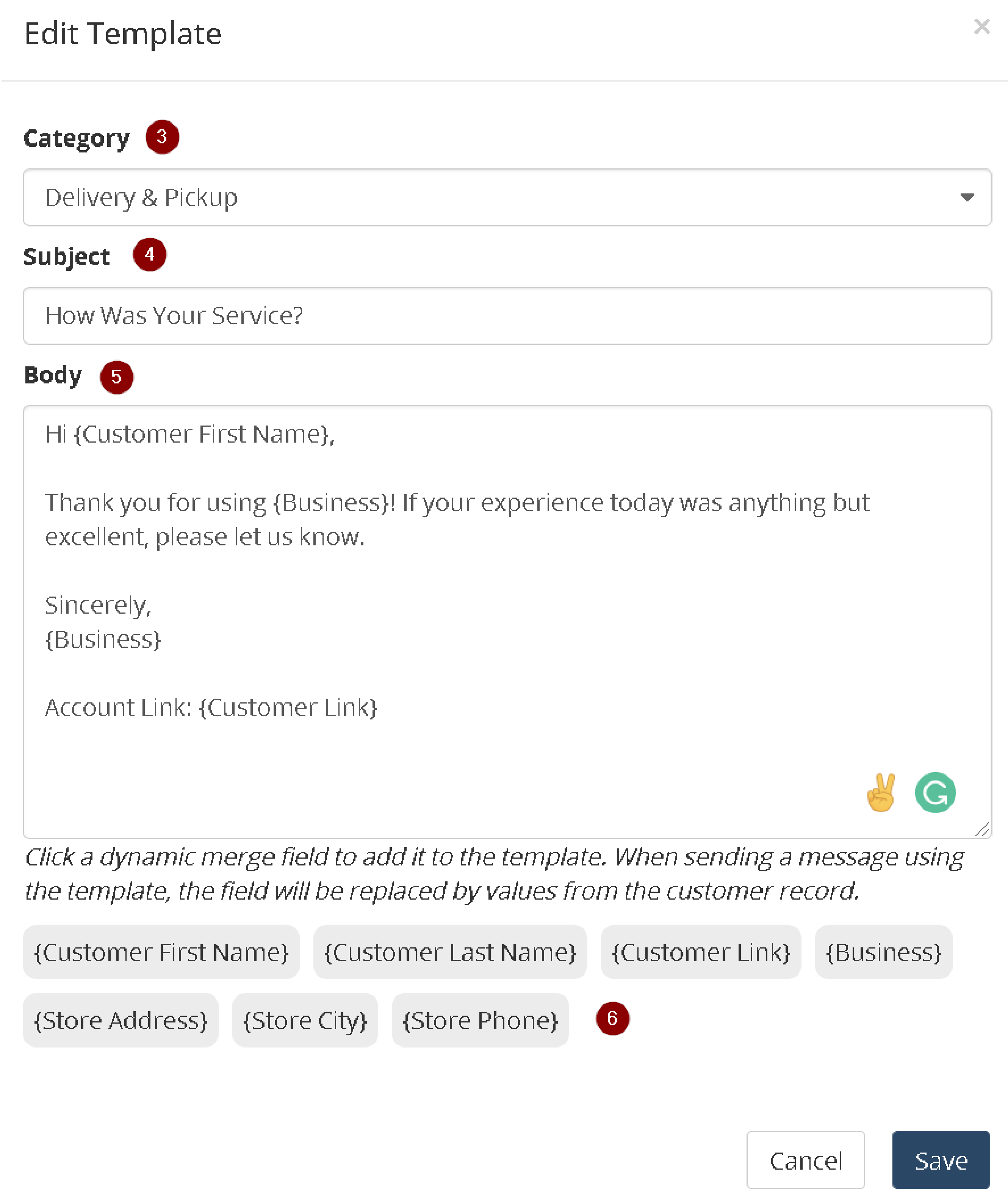


3. Select the Category you want the template to display in.

4. Enter a Subject for the template. This will be the name you see when selecting the template and for emails, it will be the subject line the customer sees.

5. Type out the Body of the message.

6. Click on any of the "dynamic merge" fields to add them to your template. They will dynamically fill depending on the customer.



7. Click Save and your template will now be in the template list for all customers.

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