



[SMRT Systems Help Center](#) > [Learning Center](#) > [Admin.](#)

Search

Articles in this section



Creating a Communication Template



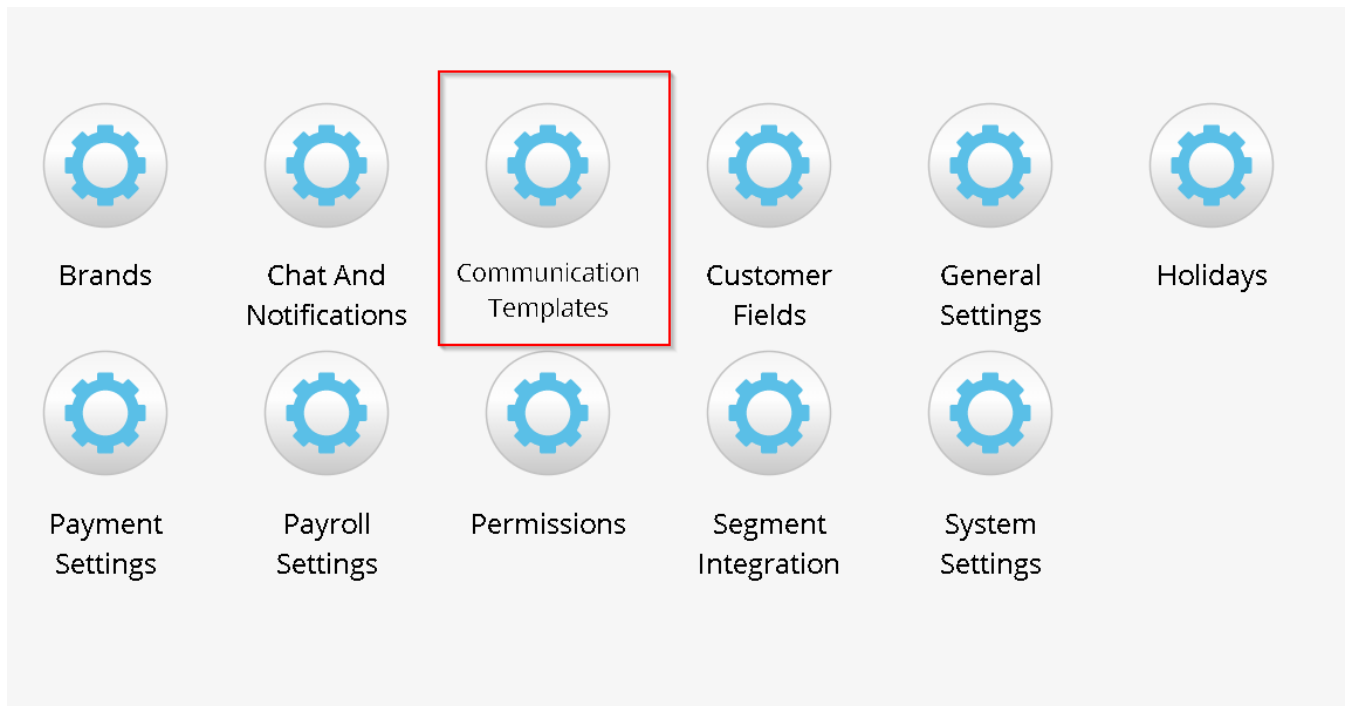
Josh Nye

2 years ago · Updated

Follow

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

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



2. To add a new template click Add Template.

+ Add Category **+ Add Template**

Financial	Set Default		
Credit Card Decline Follow Up	<input type="radio"/>	Delete	View / Edit
The Credit Card on File is Expired	<input type="radio"/>	Delete	View / Edit
Past Due Balance	<input type="radio"/>	Delete	View / Edit

Production

Item Processing Will Take Longer Than Expected	<input type="radio"/>	Delete	View / Edit
--	-----------------------	--------	-------------

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.

Edit Template



Category 3

Delivery & Pickup

Subject 4

How Was Your Service?

Body 5

Hi {Customer First Name},

Thank you for using {Business}! If your experience today was anything but excellent, please let us know.

Sincerely,
{Business}

Account Link: {Customer Link}



Click a dynamic merge field to add it to the template. When sending a message using the template, the field will be replaced by values from the customer record.

{Customer First Name}

{Customer Last Name}

{Customer Link}

{Business}

{Store Address}

{Store City}

{Store Phone}

6

Cancel

Save

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



Was this article helpful?

Yes

No

0 out of 0 found this helpful

Return to top ^

Recently viewed articles

Balancing Cash Drawers

Assigning a manual password to an employee

Adding KPI Reports to a Store

Adding a New Item Type

Adding a KPI to an Employee

Related articles

[Creating Special Care Folders](#)

[Customer.io Setup](#)

[Hotel Group Billing Setup](#)

[How To Change Due Dates](#)

[Manually Creating & Sending a Statement](#)

Comments

0 comments



Be the first to write a comment.

SMRT Systems Help Center