Templates in Engage

Templates are custom responses that you can develop, save, and reuse to provide consistent responses to common questions or issues you receive via direct messages from social media. Within Social Media Management, you can use templates within Engage.

Templates can be a great tool to help your team send consistent responses to your audience. They also ensure that your teams are equipped to respond to difficult queries in in a way that complies with your company's social media guidelines.

Who Has Access to the Templates Section?

In Social Media Management, any user with a user role of **Admin** or **Team Leader** can access response templates.

- **Admin** users can view, create, edit, and delete templates for all teams and all Channels within their organization.
- **Team Leader** users can view, create, edit, and delete templates only for teams in which they are a Team Leader.

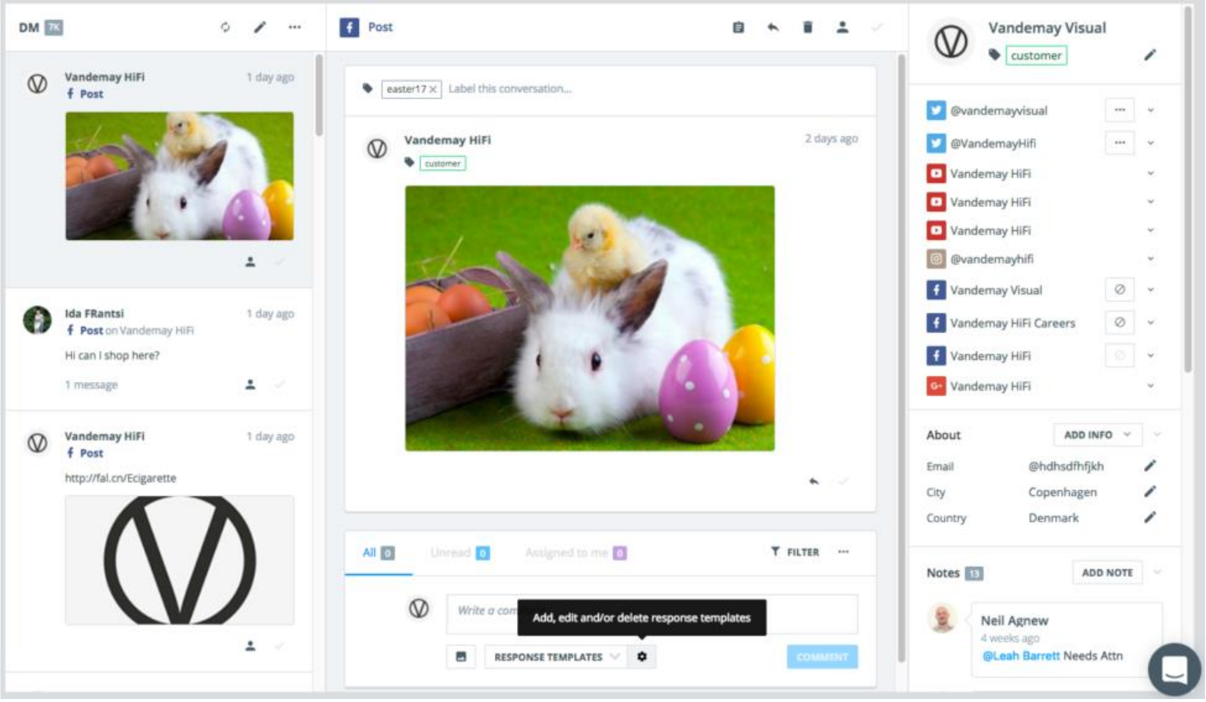
Note:

If a response template is shared with multiple teams, a Team Leader user must have a Team Leader user role on all teams to be able to view, edit, or delete it.

Creating Response Templates via Engage

1. If you are an Administrator or Team leader, go to Engage and open a message from any of your feeds.

2. Next to the **Response Templates** drop-down menu at the bottom of your feed, click the **Settings (gear) icon**.

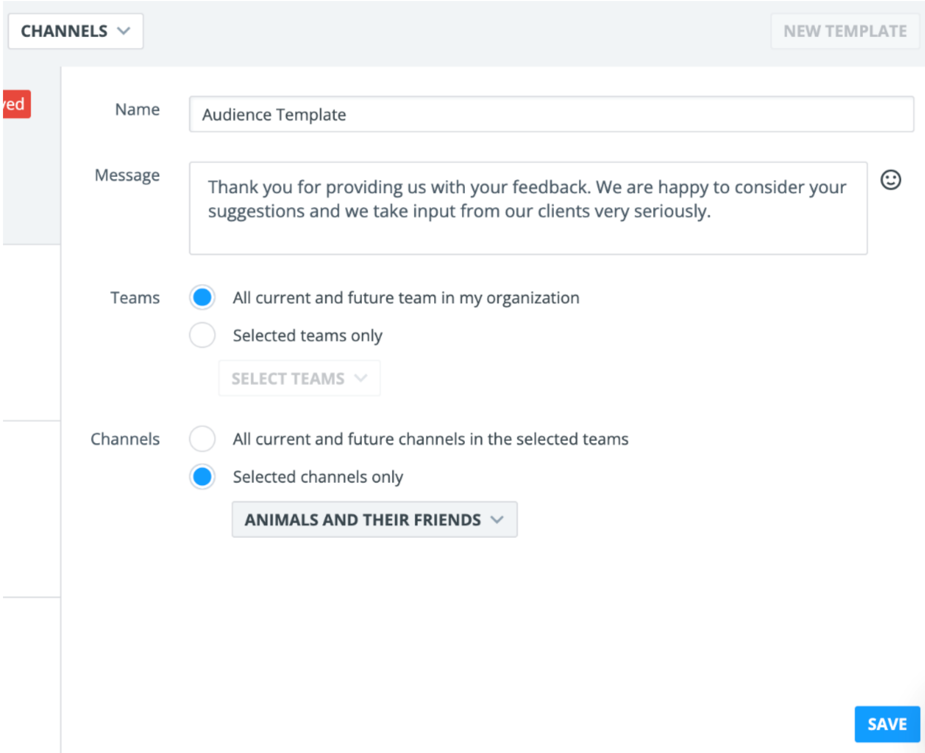


3. In the top-right of the following screen, click **New Template**.

4. Create a name for your template. Enter the text you want the template to contain in the message field.

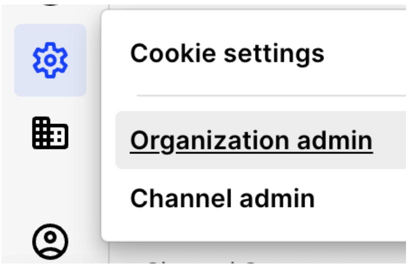
5. Under **Teams** and **Channels**, select which teams and channels you would like to be able to use the response template. Find out more about sharing your templates with multiple teams and channels below.

6. Click **Save**. Your template is now saved and available to the selected teams and channels.

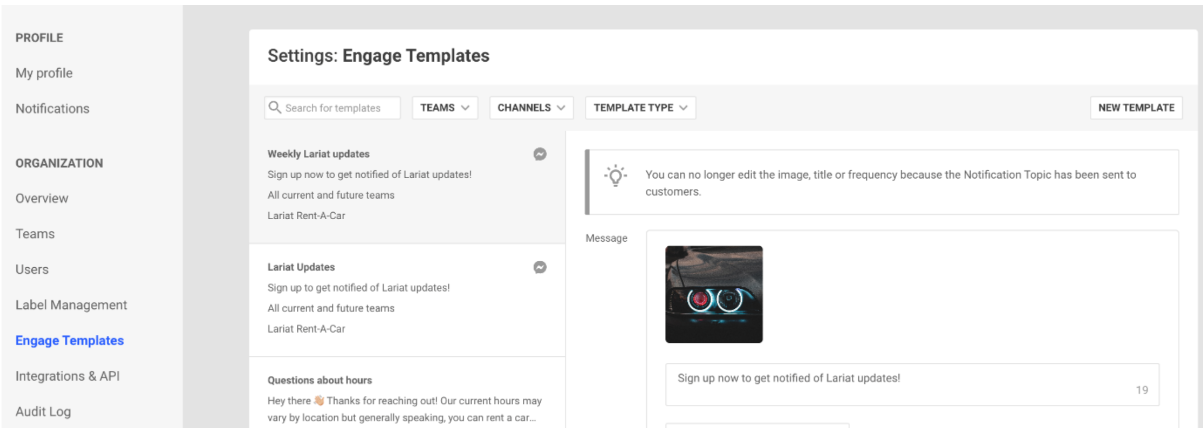


Creating Response Templates via Settings

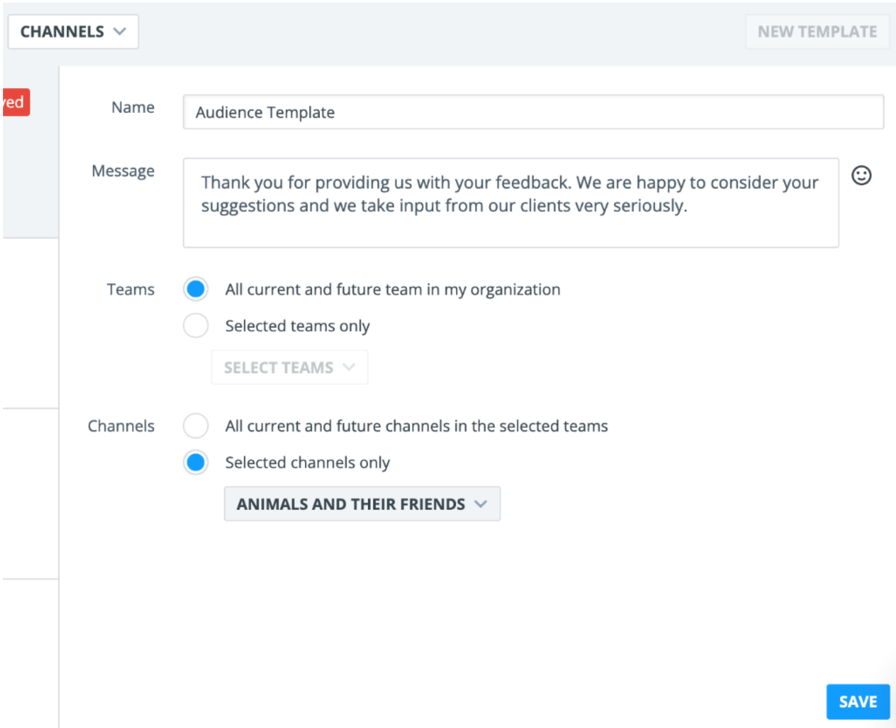
1. In the left-hand navigation sidebar, select the **Settings (gear) icon > Organization admin.**



2. Select **Engage Templates** in the left-hand Settings sidebar, then click **New Template** in the top-right.



3. Enter a name for your template (doing so will make it easier for your team to recognize the appropriate template to use when choosing from a list of templates).
4. Enter the text you would like for your template. This is the text that your comment will contain.
5. Under **Teams** and **Channels**, select which teams and channels you would like to be able to use the response template. Find out more about sharing your templates with multiple teams and channels below.
6. Select **Save**. Your template is now saved and will be available to the selected teams and channels.



Sharing Templates Across Multiple Teams and Channels

While creating a new template, you can choose to share your template with any custom amount of teams and channels in your organization.

Note:

Team Leader users may only share templates with teams in which they have a Team Leader user role.

Teams

While selecting teams, you can choose **All current and future teams in my organization**. If selected, your response template will be shared with all teams in your organization, even if your organization structure changes or more teams are added in the future.

Alternatively, you can click **Selected teams only**. Using the **Select teams** dropdown, you can click the check boxes to select one or more teams.

Channels

While selecting channels, you can choose **All current and future channels in the selected teams**. If selected, your response template will be shared with all channels in the teams selected above, even if more channels are added to the team(s) at a later date.

Alternatively, you can click **Selected Channels only**. Using the **Select Channels** dropdown, you can click the check boxes to select one or more channels.

Sharing to a Channel in multiple teams

In some cases, you may want to add a response template for only a select number of channels, regardless of which teams they are added to.

To achieve this, choose the settings below:

1. Under Teams, select the option, **All current and future teams in my organization**.
2. Under Channels, select only the applicable channel(s).

Your response template will not be shared with any other channels in the teams. In addition, your channel(s) will always have access to the template, even if added to new teams in the future.

Where Can I View, Edit, or Delete Existing Templates?

Response templates are easy to manage from Engage. You can quickly review, edit the name and the message or delete existing templates from Settings by clicking the **Settings** button.

Alternatively, under the Teams tab, you can view templates attached to each team by clicking on the **Templates** button of a team. **Edit template** allows you to alter your existing templates.

Using Templates

You can use templates to optimize your communication flow with your audience. When you reply to a post, you have the option to select from the list of templates you have created and saved. To reply to a post using your templates:

Select the post you would like to reply to (it should open out on the right-hand side of the screen).

In the comment box below the post, select one of your templates from the drop-down list and then select **Comment** to publish the template as your reply.

What Are Some Common Examples of Templates?

The types of templates you will create will depend on the nature of your business. However, some general ones we have seen used quite well include:

- Product availability issues
- Removing/deleting posts, i.e. violation of guidelines for page
- Notifications, e.g. price increase or price change
- Bad customer service experience
- Referral: referring a customer to their local store for more information
- Referral: advising the customer that an internal colleague will need to help with their particular query