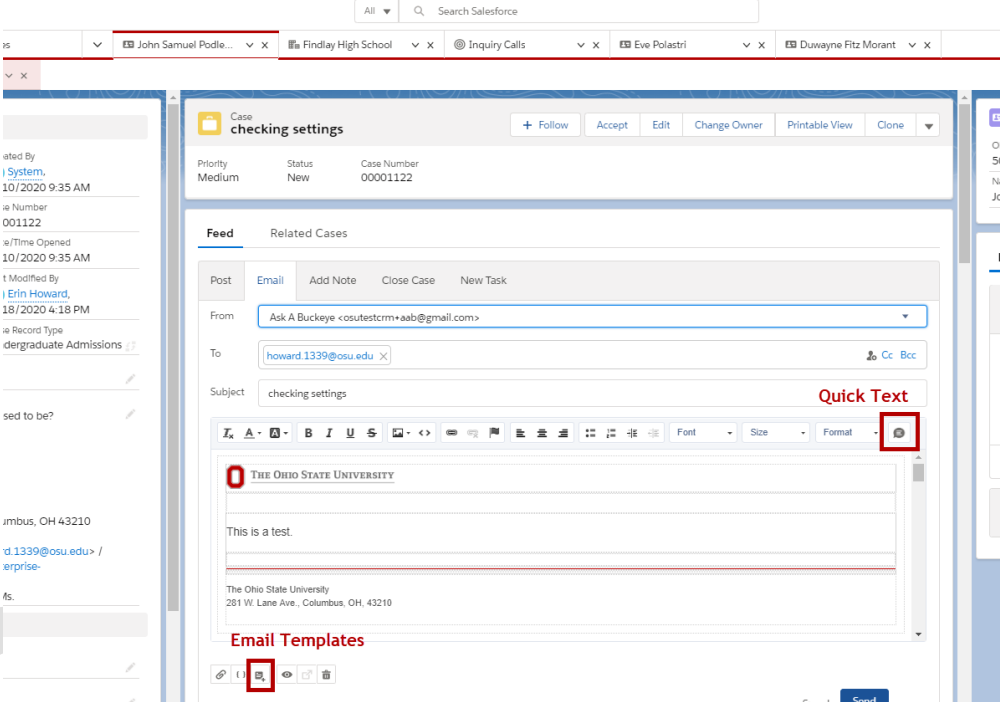
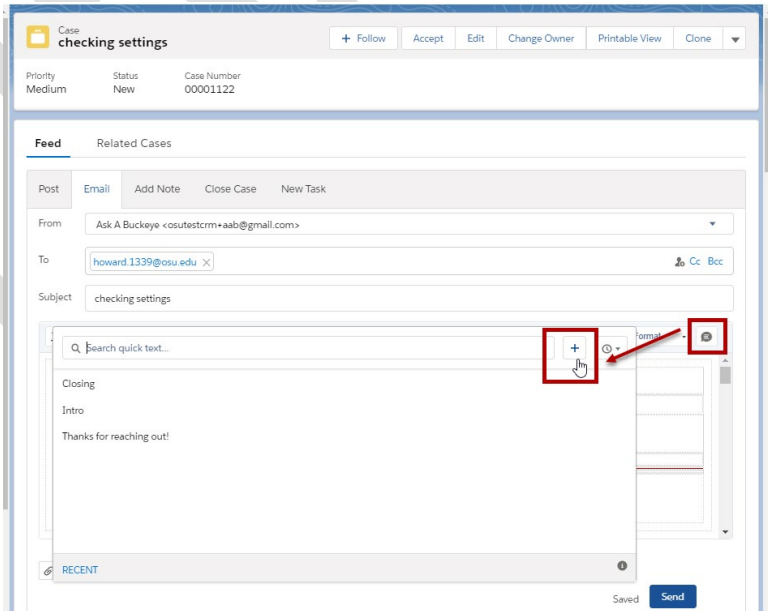


CREATING QUICK TEXT

Step-by-Step	Screen
<p>Quick text is functionality for users to be able to add frequently utilized phrases or paragraphs and insert them into an email.</p> <p>They are plain text, and whatever you create will be available for your use only.</p> <p>Your team's canned response functionality will be fulfilled by email templates.</p>	
<p>After clicking quick text, a window will appear showing your other recently used responses.</p> <p>Click the plus sign to add a new response.</p>	

1. Name your quick text.

2. Add any merge fields that you want to utilize in the quick text message and type out quick text message.

Note:

To prefill the contact's first name, use {!Contact.FirstName}
For your branded signature, use {{{Sender.Signature_Block__c}}}

3. You can categorize your quick text as closing, greeting, etc.

4. Ensure that email is selected so you can utilize your quick text in an email.

The screenshot shows the 'New Quick Text' form. A red box labeled '1' highlights the 'Quick Text Name' field, which contains the text 'Closing'. Another red box labeled '2' highlights the 'Insert Merge Field' section, which includes dropdowns for 'Related To' and 'Field', an 'Insert' button, and a preview of the message content: 'I hope you find this information helpful. Please reach out if you have any additional questions. Sincerely, {{{Sender.Signature_Block__c}}}'. A third red box labeled '3' highlights the 'Category' dropdown, which is set to 'Greetings'. A fourth red box labeled '4' highlights the 'Selected' channel dropdown, which is set to 'Email'. At the bottom, there are buttons for 'Preview', 'Cancel', 'Save & New', and 'Save'.

After you save the quick text, it will be available for you to utilize.

The top screenshot shows an email composition window with a search bar for quick texts. The search results show 'Closing' selected. The email body contains the text: 'I hope you find this information helpful. Please reach out if you have any additional questions. Sincerely, {{{Sender.Signature_Block__c}}}'. The bottom screenshot shows the same email composition window after the quick text has been inserted. The email body now contains the text: 'I hope you find this information helpful. Please reach out if you have any additional questions. Sincerely, {{{Sender.Signature_Block__c}}}'. The cursor is positioned at the end of the text.

If you need to edit or delete your message, navigate to Quick Text through the App Launcher.

Select the quick text that you want to edit or delete and choose the corresponding action.

For edits, you will be navigated to the quick text message. After then selecting the Edit button, you will be able to update the response.

The image shows a two-part screenshot of a software interface. The top part is the 'App Launcher' page, which has a search bar at the top and two sections: 'All Apps' and 'All Items'. In the 'All Items' section, a red box highlights the 'Quick Text' link. The bottom part is the 'Quick Text' interface, titled 'Quick Text Recently Viewed'. It shows a list of items with checkboxes and names. A red box highlights the checkbox for the item named 'Closing'. Another red box highlights a dropdown menu next to the 'Closing' item, which contains 'Edit' and 'Delete' options. Below this, a third red box highlights the 'Edit' button in the top right corner of the 'Closing' item's detail view. The detail view shows fields for 'Quick Text Name', 'Message', 'Sincerely', 'Category', 'Greetings', 'Channel', and 'Email'.