

Templates

Templates are used to send automated replies, canned messages, automatic follow-ups, pre-populated first response and provide scripted answers for consistent approach.

Both SMS and Email templates can be created; templates are located at Settings->Productivity->Templates.

Template Details

Name:

Usability: ☐ Available to all Teams ☐ OFF

Description:

Usable by Specific Teams:

Template Body

Hi [first name],

To continue your Accounts & Billing query, we need the following information:

- Employee Number
- Date of Birth
- Address

Please reply to this message with this information and a brief description of your query.

Best regards,

Template Attachments

No attachments

A template needs a name,
It can be restricted to certain Teams,
A description is helpful,
Files or pictures can be attached, or even HTLM template included,

In the text editor placeholders are used to include customised information as shown below:

Template Body

Hi {{customer:name}},

Your reference is {{ticket:ticket_ref}}

{{customer:Order Number}}

Placeholder dropdown menu:

- Ticket
 - Ticket ref
 - Status
 - Respond by
 - Resolve by
- Customer
 - Name
 - Email
 - Phone number
- User
 - Real name
 - Email
- Team
 - Team name

Custom attributes can also be used with Placeholders even though they're not displayed in the available options under the Placeholder button.

To use Custom Attribute Placeholders in Templates or Campaigns you can manually type {{customer:xxx}} – enter the name of the custom attribute in place of 'xxx'.

For example if there were a custom attribute 'Policy Number' with a unique value for each Customer, this can autofill for template responses by typing:

```
{{customer:policy_number}}
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