

Text Templates

12/03/2025 2:24 pm CST

Overview

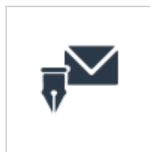
Text Messaging Templates allow you to create reusable text messages that can be sent to clients manually or automatically. These templates are created within the Ad Hoc Email editor and can support a variety of communication workflows such as appointment confirmations, follow-ups, and campaign-driven automation. Although they are created in the Ad Hoc Email area, they function independently of email and can be used solely for texting when needed.

This article will review:

- [Settings and Navigation](#)
- [Using Texting Templates](#)
- [FAQs](#)

Settings and Navigation

To create or manage text templates, go to: **Control Panel > Ad Hoc Emails**.



[Ad Hoc Emails](#)

Edit the email templates that you can use to send individual emails to contacts.

From there, open an existing Ad Hoc Email template that is a **Contact type**, or create a new one.

- Click **Edit** to add a text template to an existing Ad Hoc Email.
- Click **Add** to create a new one from scratch.



Important: Only **Contact type** Ad Hoc Email templates will appear as text options for manual texting.

Add Ad Hoc Template

Name*

New Prospect Follow-Up 1

Active?

☒ Active

Type*

Contact ▼

Scroll down to the **Texting Format** section to create your text message template.

You do **not** need to fill out the email section to use a texting template. If you're creating a texting-only template, simply leave the **Editor** section blank.

Texting Format

Save

Enter your text message content here. The following apply:

- Contact shortcodes are supported
- Full pasted links are supported
- HTML is **not** supported

Using Texting Templates

Sending a Text Manually

In the main **Texting** section, you can select a contact to send a message. At the bottom of the page, you'll see a dropdown that lists your available text templates. Select the one you want to use, and it fills out the text field and can be edited before sending.

Yay! Your Bob's Handyman - Plano Service is here!
Tuesday, December 2 at 10:50a (Please allow a 2
hour arrival window for afternoon Services) Service
Confirmation is still needed! Please click the link
below to confirm your appointment
<https://serviceminder.com/service/appointment/confirm>
Your service agent:

Send

Templates

✓ --Choose one--

CTA template

March 2023 Honey Badger Campaign - 1

Missed Call Followup Text

In the main **Texting** section, you can select a contact and send a message. At the bottom of the page, you'll see a dropdown containing your available text templates. Selecting a template will populate the texting field, and you may edit the text before sending.

The same options appear on the **Texting tab** within a contact's profile.

Automating with Drip Triggers

Ad Hoc text templates can be used within **Drips**, and this is not limited to Contact type templates.

When building a trigger or campaign:

1. Add an **Action**
2. Select **Send Text**
3. Either type a custom message or choose a text template from the dropdown

The template options will match the **trigger type**. For example, if the trigger relates to proposals, only **proposal-type** text templates will appear.

This allows you to use text templates for proposals, invoices, appointments, and contacts in automated drip workflows.

The screenshot shows a user interface for sending a text message. At the top, there's a 'Send Text' button with a dropdown arrow. Below it, a 'Send Text Details' section contains a 'Message' input field and an 'Ad Hoc Email Template' dropdown menu. The dropdown menu is open, showing options: '--Select one--', '--Select one--', 'Invoice Trigger Testing', and 'Texting Proposal'. A 'Details...' link is visible in the top right corner.

Other Automations

Your Ad Hoc text templates can be used automatically without drip triggers in certain scenarios. For example:

If an Ad Hoc Email template is set up for **Appointment Confirmation** on a service and the contact has selected **text confirmation** instead of email, then the text version of that template will be sent automatically.

You can also edit or review your default automated texts anytime at: **Control Panel > Automated Text/Voice**

FAQs

I set up a text template on one of my ad hoc emails. Why isn't it sending to the customer when the email goes out?

The text template on an email will not automatically go out, unless it is for an appointment related communication, the contact has chosen text confirmation, and the ad hoc email template is set up on the service the appointment is for. Otherwise, you'll need to use Drips to configure your automation to send out your text template.

When I go to a contact's page and try to use the dropdown to select a text template I set up, it's not there as an option. Why not?

The only text templates available on the contact page and in the texting hub are **contact** type, so if you set up a template for proposals, invoices, or appointments, the text template will not show up.

Can I use shortcodes in my text templates?

[Shortcodes](#) will work in text templates, but keep in mind the type of message and shortcodes you're trying to use. For example, proposal shortcodes won't work in a contact type template.

