Text Templates

08/21/2024 9:06 am CDT

Overview

Text templates can be created in the **Ad Hoc Email** editor and used for client communication, either automatically or manually.

Settings and Navigation

Go to **Control Panel > Ad Hoc Email**. Navigate to an existing Ad Hoc email that's a **Contact type**, or create a new one.

Click Edit if you want to add a text template to an existing email or Add to start fresh.

You do not have to have an email template filled out to send a text template. Leave the email section blank if you only want to create a texting template. **Remember it has to be a Contact type email!**

Contact Texts

The name of the email template will be the name that shows up in the Text Template dropdown, so make sure the title is descriptive.



Scroll below the email editor, and you'll see Texting Format. Enter your text here - contact shortcodes will work here, as well as full links that are pasted in. HTML is not supported.

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. This can be edited before sending.



On a contact page, in the Texting tab, you'll see the same options.

Only contact type text templates will show up in the dropdown in the texting hub and contact's texting tab.

Other Template Types

You can set up text templates in ad hoc emails for other types (proposal, invoices, appointments) but these templates will only be available for you to select if you're using Drips (see more info below.)

Custom Automated Texts

One scenario where your ad hoc text can be used automatically is if you have an ad hoc email template set up for Appointment Confirmation on a service **and** the contact has selected text confirmation in lieu of email. In this instance, your text template set up on the ad hoc email would go out to them.

Remember, you can edit the default texts that go out automatically in Control Panel > Automated Text/Voice.

Drips

You can select your ad hoc text templates when using Drips - this isn't limited to contact type, but will allow you to utilize your templates for other types.

As an action in your trigger or campaign, select Send Text, and either input your own message or select a text template from the dropdown.



Send Text Details		
Message 🔿		1
Ad Hoc Email Template 🖲	Select one 🔻	
	-Select one-	
	Texting Proposal	

The options will correspond to the trigger type that you're using. So if the trigger is related to proposals, then the options in the dropdown will be text templates on proposal type ad hocs.

Q&A

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.