Email Templates

What Are Email Templates?

Email Templates allow you to create reusable email content that can be used throughout AgentRoof CRM.

They help save time by allowing you to create predefined email messages that can be used in Action Plans, manual email communication, and other automation features.

Email Templates support customizable subjects, email content, merge fields, images, and file attachments.

Access Email Templates

1. From the left-hand menu, Select **Templates**.
2. Click **Email Templates**.

The Email Templates page will be displayed.

Email Templates are organized into folders for easier management.

Understanding Template Folders

Templates are stored inside folders.

The system includes default folders created by AgentRoof.

System Folders

System-generated folders:

- Start with **AgentRoof**
- Cannot be edited
- Cannot be deleted

In addition to system folders, you can create your own folders to organize custom templates.

View Email Templates

1. Navigate to **CRM > Templates > Email Templates**.

2. Click the folder containing the template.
3. Locate the desired template.
4. Click **View** in the Actions column.

The template preview will be displayed.

Create a Folder

1. Navigate to **CRM > Templates > Email Templates**.
2. Click **Create Folder**.
3. Enter the Folder Name.
4. Click **Save**.

The folder will be created successfully.

Create an Email Template

Email templates can be created inside an existing folder or a newly created folder.

1. Navigate to **Templates > Email Templates**.
2. Click **Add Email Template**.

The Email Template Editor will open.

3. Enter the template name.
4. Select the folder where the template will be saved. If the required folder does not exist, click **Add Folder**, create a new folder, and then select it for the template.
5. Enter the email subject.
6. Enter the email body content.
7. Configure any additional template settings as required.
8. Click **Save**.

The Email Template will be created successfully.

Configure Template Details

Enter the following information:

- Template Name
- Folder Name
- Subject
- Email Body

Customize the Email Body

The editor allows you to customize:

- Font Type
- Font Size
- Font Style
- Text Formatting
- Alignment
- Colors
- Lists
- Links

and other formatting options.

Add Images:

To insert an image:

1. Click the **Image** button in the editor toolbar.

Insert by URL:

1. Enter the image source URL.
2. Configure image width and height if required.
3. Save the image.

Upload an Image:

1. Select the Upload option.
2. Drag and drop the image or browse for the file.
3. Save the image.

Preview Email Content

While editing the email body:

1. Click **View**.

The email preview will be displayed.

Use Merge Fields

Merge Fields allow dynamic information to be inserted automatically when the email is sent.

Examples include:

- First Name
- Contact Name
- Contact Phone
- Contact Address
- Realtor Name
- Realtor Email

When inserted into a template, merge fields appear as placeholders such as:

`[[name]]`

The actual lead information will automatically replace the placeholder when the email is delivered.

Merge fields can be used in both:

- Subject Line
- Email Body

Add Attachments:

1. Click **Attachment**.
2. Drag and drop the desired file or browse for the file.
3. Upload the attachment.

The attachment will be included when the email is sent.

Save the Template:

After completing all required information:

1. Click **Save**.

The Email Template will be created successfully.

Edit an Email Template

1. Open the folder containing the template.
2. Locate the desired template.
3. Click **Edit**.

Make the required changes.

You can then, Update Existing Template

Click **Update** to save changes to the current template.

Save As New Template

Click **Save As**.

Enter a new template name.

A new template will be created while preserving the original.

Delete an Email Template

1. Open the folder containing the template.
2. Locate the desired template.
3. Click **Delete**.
4. Confirm the deletion.

Important Note

Email Templates currently assigned to an Action Plan cannot be deleted.

You must first remove the template from the Action Plan before deleting it.

Copy an Email Template

1. Open the folder containing the template.
2. Locate the desired template.
3. Click **Copy Template**.
4. Select the destination folder.
5. Click **Copy**.

A duplicate of the template will be created in the selected folder.

The copied template will retain the original template name unless renamed later.

Move an Email Template

1. Open the folder containing the template.
2. Locate the desired template.
3. Click **Move Template**.
4. Select the destination folder.
5. Click **Move**.

The template will be moved successfully.

Using Email Templates in Action Plans

Email Templates can be used while creating or editing Action Plans.

1. Navigate to **Automation > Action Plans**.
2. Create a new Action Plan or edit an existing Action Plan.
3. Click **Add Action**.
4. Select **Send Email** as the action type.

5. Choose the desired Email Template.
6. Configure the execution timing.
7. Click **Save** or **Update**.

The selected Email Template will be used when the Action Plan executes the email step.

Note: While selecting an Email Template, you can create a new template by clicking the **Plus (+)** button next to the template selection field.

If required, you can also create a new folder while creating the template and then select that folder for the new Email Template.

You have successfully learned how to manage Email Templates in AgentRoof CRM.

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