

SMS templates

What Are SMS Templates?

SMS Templates allow you to create reusable text message content that can be used throughout AgentRoof CRM.

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

SMS Templates support customizable message content and merge fields for personalized communication.

Access SMS Templates

1. From the left-hand menu, select **Templates**.
2. Click **SMS Templates**.
3. The SMS Templates page will be displayed.

SMS 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 SMS Templates

1. Navigate to **CRM > Templates > SMS Templates**.
2. Click the folder containing the template.

3. Locate the desired template.
 4. Click **View** in the Actions column.
 5. The template preview will be displayed.
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Create a Folder

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

The folder will be created successfully.

Create an SMS Template

SMS Templates can be created inside an existing folder or a newly created folder.

1. Navigate to **Templates > SMS Templates**.
2. Click **Add SMS Template**.
3. The SMS Template Editor will open.

Configure Template Details

Enter the following information:

- Template Name
 - Folder Name
 - SMS Message Content
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Select a Folder

Choose the folder where the SMS Template will be stored.

If the required folder does not exist:

1. Click **Create Folder**.
2. Enter the Folder Name.
3. Click **Save**.
4. Select the newly created folder.

Folders help organize templates and simplify template management.

Create SMS Content

Enter the SMS message content in the template editor.

The message entered here will be used whenever the SMS Template is selected in communications or automated workflows.

Use Merge Fields

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

Examples include:

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

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

[[name]]

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

Merge fields can be inserted directly into the SMS message content.

Save the Template

After completing all required information:

1. Click **Add Text Template**.

The SMS Template will be created successfully and displayed in the selected folder.

View an SMS Template

1. Navigate to **CRM > Templates > SMS Templates**.
2. Open the folder containing the template.
3. Locate the desired template.
4. Click **View**.

The template preview will be displayed.

Edit an SMS Template

1. Open the folder containing the template.
2. Locate the desired template.
3. Click **Edit**.
4. Make the required changes.

The SMS Template will be updated successfully.

You can save your changes in two ways:

Update

Click **Update Text Template** to modify the existing template.

“ **Note:** If the template was originally created by AgentRoof, selecting **Update Text Template** will transfer its ownership to the realtor.

Save As

Click **Save As** to create a separate copy of the template using a new name.

“ **Note:** The original template will remain unchanged and retain its existing ownership, while the newly created template will be owned by the realtor.

Additional Information

“ **Note:** Changes made to an SMS Template only affect future usage of the template. Previously sent SMS messages are not modified.

Delete an SMS Template

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

The SMS Template will be removed successfully.

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SMS 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 SMS 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.

“ **Note:** The original template will remain unchanged and retain its existing ownership. The copied template will be created under the realtor's ownership and can be managed independently.

Move an SMS 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.

“ **Note:** The template will retain its existing content and configuration. If the template was originally created by AgentRoof, ownership will be transferred to the realtor after it is moved.

Using SMS Templates in Action Plans

SMS 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 Text** as the action type.
5. Choose the desired SMS Template.
6. Configure the execution timing.
7. Click **Save** or **Update**.

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

Add SMS Templates in Action Plans

SMS Templates can be created in an action plan

1. Create a new Action Plan or open an existing Action Plan.
2. Click **Add Action**.
3. Under **Action**, select **Send Text**.
4. In the **Template** section, click the **+** icon.
5. Enter the required SMS Template details.
6. Configure the template content as needed.
7. Once all required fields have been completed, save the template.

The newly created SMS Template will now be available for use within the Action Plan.

Conclusion

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

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