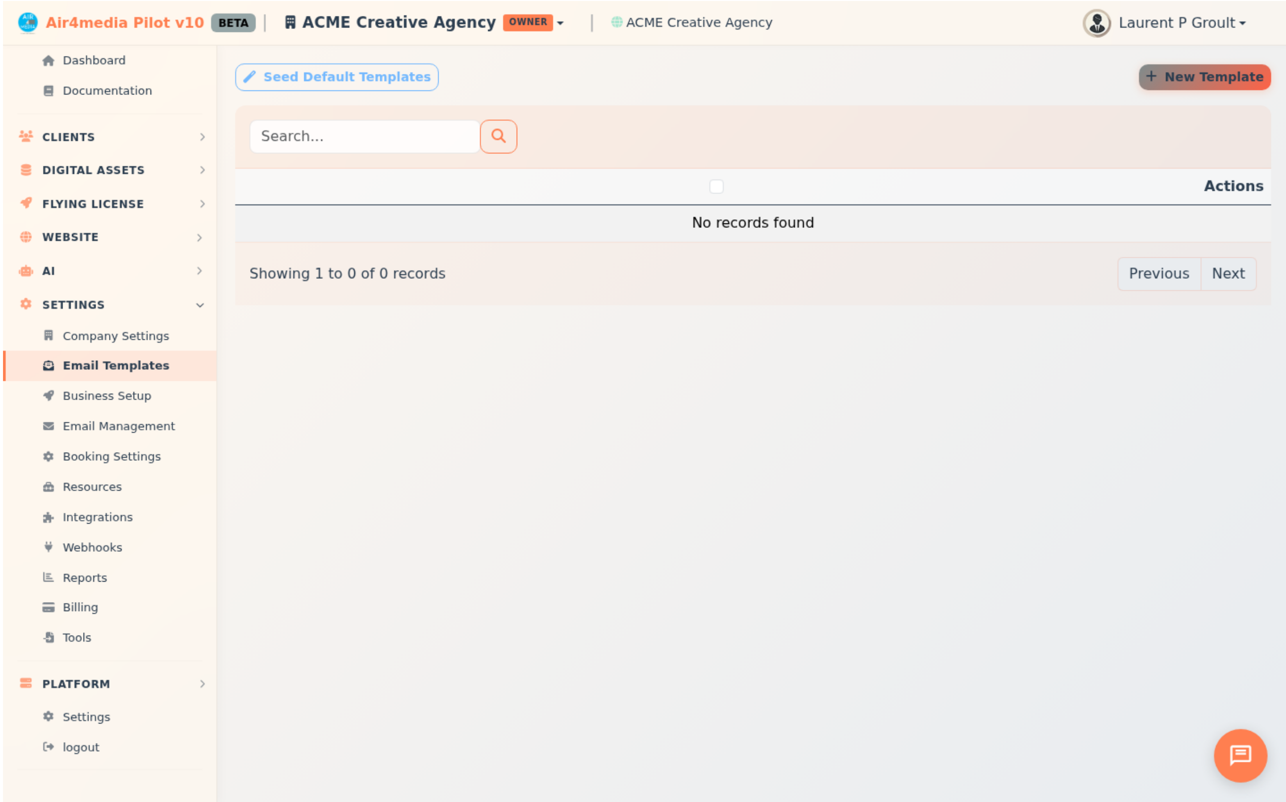

Email Templates

Create and manage reusable email templates for every stage of your client workflow — quotes, contracts, invoices, appointments, and more. ACME Creative Agency, for example, keeps ready-made templates for every client touchpoint, from a first quote to a final invoice reminder, so every message goes out polished and on-brand.

Key Features

- **Template Library**: All your standard emails in one place, organized by category and searchable by name or subject
- **Merge Variables**: Automatically personalize emails with contact names, project details, quote amounts, invoice numbers, and more — inserted with a single click
- **Live Preview**: See exactly how your email will look with realistic sample data filled in before ever using it
- **Categories**: Organize templates by type — Quotes, Contracts, Invoices, Appointments, Portal, and General
- **Duplicate**: Copy any template as a starting point — the editor opens immediately with the copy ready to edit
- **Default Templates**: Load 10 professionally written templates instantly to hit the ground

running

How to Use

Creating a Template

1. Click **New Template** in the top right
2. Enter a name for the template (used internally — e.g. "Quote Follow-Up")
3. Choose a category and set the status to **Active** or **Inactive**
4. Write your subject line, optionally including merge variables
5. Write the email body in the main editor — HTML formatting is supported
6. Click any variable chip in the right panel to insert it at your cursor position
7. Click **Preview** to check how the email looks with sample data
8. Click **Save Template**

Using Variables

The variables panel on the right side of the editor lists all available merge tags, grouped by type:

- **Contact** — first name, last name, email, phone
- **Account** — company name, email, phone
- **Project** — name, start date, end date, venue
- **Quote** — number, total, valid until, link
- **Contract** — title, number, link
- **Invoice** — number, total, due date, link
- **Appointment** — type, date, time, location
- **Company** — your business name, phone, email
- **Portal** — client portal link

Click any chip to insert it at the current cursor position in the body.

Loading Default Templates

Click **Seed Default Templates** to instantly create 10 pre-built templates covering the most common CRM scenarios: quote sent, quote accepted, contract ready, invoice sent, payment received, appointment confirmation, appointment reminder, client portal welcome, follow-up, and thank you. Templates that already exist by name are skipped automatically, so it's safe to run more than once.

Managing Templates

Each row in the list has four actions:

- **Edit** — open the editor to modify the template
- **Duplicate** — create a copy and open it in the editor immediately
- **Preview** — view the rendered email with sample data substituted in
- **Delete** — permanently remove the template

Use the **Category** filter above the list to narrow results, or search by name or subject line.

Tips

- Use specific names so templates are easy to find — "Invoice Reminder – 7 Days" is clearer than just "Invoice"
- Always preview before using a new template to catch formatting issues or missing variables
- Set a template to **Inactive** to keep it saved without it appearing in active use — useful for seasonal or situational emails you don't need year-round
- Duplicate an existing template and tweak it rather than starting from scratch for similar emails