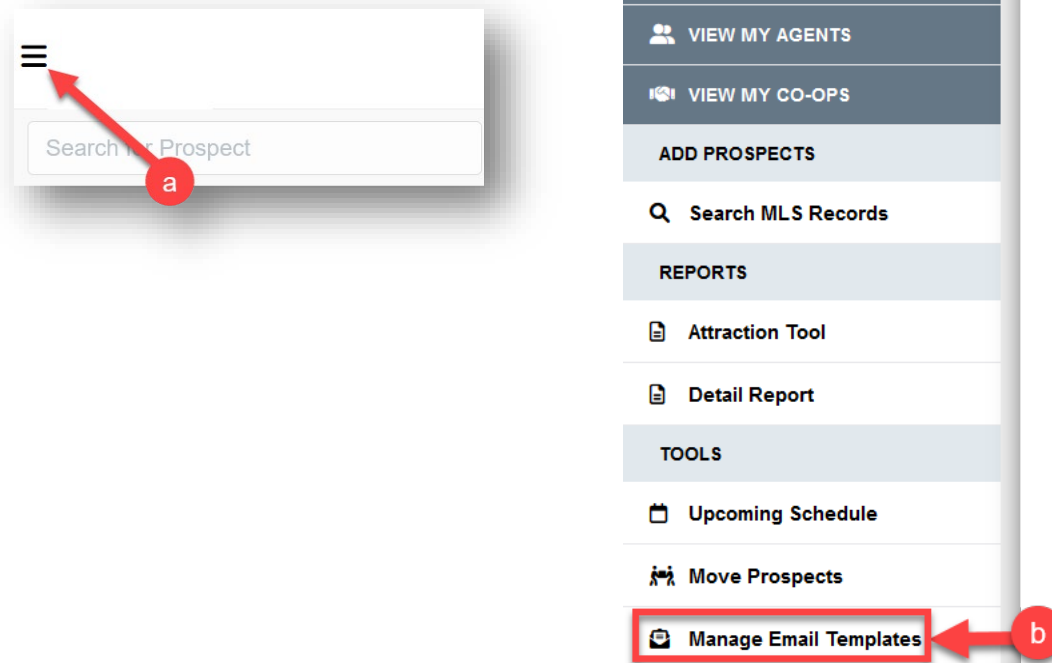


## Email Templates

You can now customize your communications to your prospects and agents by creating and managing email templates. There is a new menu item called **Manage Email Templates**, where you can add, edit, and manage your email templates.

To access the enhanced filter panel:

- Click **menu** to expand the left-hand side menu panel.
- Click **Manage Email Templates**



**MANAGE EMAIL TEMPLATES**

Your template list will be displayed in a tabular format. The list is sorted with your most recently used template displayed first. From this screen you can perform the following actions:

- a. Add Template
- b. Edit Template
- c. Copy Template
- d. Delete Template

From this screen you can see:

- e. Template Name
- f. Description
- g. Template Type
- h. Last Modified
- i. Last Used
- j. # of Times Used
- k. Default Template

**Manage Email Templates** a [+ Add Template](#)

Actions	Template Name ▲ e	Description f	Template Type g	Last Modified h	Last Used i	# of times used j	Default Template k
	iProspect Multi Property Congratulatory	iProspect's multiple property congratulatory Email template	Property Multi	02/18/2022			<input type="checkbox"/>
	iProspect Single Property Congratulatory V1	The first version of iProspect's single property email template including Co-Op.	Property Single	02/18/2022			<input checked="" type="checkbox"/>
	iProspect Single Property Congratulatory V2	The second version of iProspect's single property email template.	Property Single	02/18/2022			<input type="checkbox"/>
	iProspect Standard Email	iProspect's standard email template (Free form, Birthday, Anniversary, Nice Meeting You, etc.)	Standard	02/18/2022			<input type="checkbox"/>

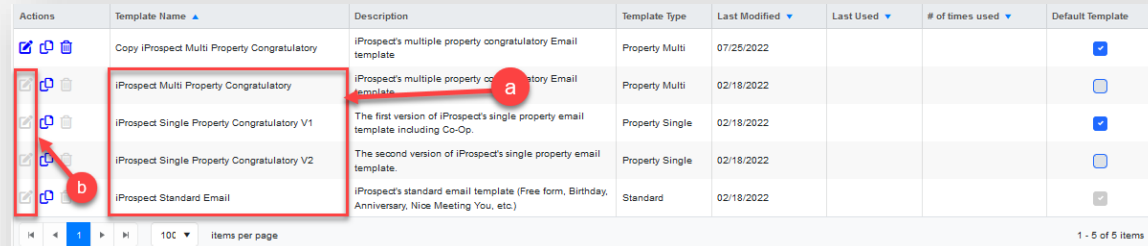
1 items per page 1 - 4 of 4 items

### CANNED TEMPLATES

These are a set of templates that provide a default for each template type and keep the existing email functionality operational. Canned templates are available for all users and cannot be edited.

- a. The default view of **Manage Email Templates** displays the iProspect canned templates.
- b. Note that the **Edit** button is grayed out for the canned templates.

The canned templates can be copied, so you can use them as a starting point for your own custom templates.



Name	Description	Type	Default
iProspect Standard Email	iProspect's standard email template (Free form, Birthday, Anniversary, Nice Meeting You, etc.)	Standard	Yes
iProspect Single Property Congratulatory V1	The first version of iProspect's single property congratulatory email template including Co-Op	Property Single	No
iProspect Single Property Congratulatory V2	The second version of iProspect's single property congratulatory email template	Property Single	Yes
iProspect Multi Property Congratulatory	iProspect's multiple property congratulatory Email template	Property Multi	Yes

### TEMPLATE TYPES

iProspect displays available templates by type, depending on the specific location within the application. For example, when you want to send a congratulatory email for multiple properties, template of type **Property Multi** will be available for you to select.

Type	Use Case
Standard	Send a standard email for any reason
Property Single	Send a congratulatory email for a single property
Property Multi	Send a congratulatory email for multiple property

**QUICK VIEW**

To get a quick view of the template body, hover over any of the template names.

Actions	Template Name	Template Type	Last Modified	Last Used	# of times used	Default Template
	Copy iProspect Multi Property Congratulatory	all template	Property Multi	07/25/2022		<input checked="" type="checkbox"/>
	iProspect Multi Property Congratulatory	all template	Property Multi	02/18/2022		<input type="checkbox"/>
	iProspect Single Property Congratulatory V1	email template	Property Single	02/18/2022		<input checked="" type="checkbox"/>
	iProspect Single Property Congratulatory V2	Property Single	Property Single	02/18/2022		<input type="checkbox"/>
	iProspect Standard Email	Standard	Standard	02/18/2022		<input checked="" type="checkbox"/>

Hi ((Recipient Nickname)),  
 Congratulations on your transactions!  
 What a great job, it is agents like you who inspire others to be their best selves in this business.  
 I'll be keeping an eye out for your future success. Wishing you only more growth in your business.

**DEFAULT SELECTION**

Each template type can only have one default. If you remove the default designation from a template, iProspect will ask you to assign a new template for that type to be the new default.

**iProspect**

Please select a default template for the 'Property Multi' template type

(Choose Template)

iProspect Multi Property Congratulatory

Cancel Continue

**PLACEHOLDERS**

Placeholders are used when creating templates. The placeholders are substituted with real data values when the template is being used within an actual email.

Name	Description	Template Type	Location
{{Recipient Name}}	Name of the recipient from the prospect or agent list.	Standard, Property Single, Property Multi	All iProspect emails
{{Recipient Nickname}}	Nickname of the recipient from the prospect or agent list. If unavailable, "Recipient Name" is used.	Standard, Property Single, Property Multi	All iProspect emails
{{Street}}	The street address of a particular property	Property Single	Congratulatory emails in the production detail screen.
{{City}}	The city of a particular property	Property Single	Congratulatory emails in the production detail screen.
{{Zip}}	The zip code of a particular property	Property Single	Congratulatory emails in the production detail screen.
{{Transaction Type}}	The type of transaction (listing, contract, sale)	Property Single	Congratulatory emails in the production detail screen.
{{Transaction Date}}	The date of the property in its current transaction type	Property Single	Congratulatory emails in the production detail screen.
{{Property Price}}	The price of the property in its current transaction type	Property Single	Congratulatory emails in the production detail screen.
{{Co-Op Agent Name}}	The name of the Co-Op agent if applicable	Property Single	Congratulatory emails in the production detail screen.

## ADD TEMPLATE

To add a new template, click **Add Template** from the **Manage Email Templates** screen. A popup is launched where you can enter the following template fields:

- a. **Name:** A short name that will be used to identify the template within the application
- b. **Type:** The template type (Standard, Property Single, Property Multi)
- c. **Description:** Your description for the purpose of the template.
- d. **Subject:** The content of the subject line of the template.
- e. **Body:** The content of the body of the template.

You can edit the template body field using the built-in editor. You can also drag and drop the placeholder badges into either the template body or the subject.

The screenshot shows the 'Add Email Template' popup form. At the top, there is a blue button labeled '+ Add Template'. The form itself is titled 'Add Email Template' and contains the following fields and elements:

- Name\***: A text input field, annotated with a red circle 'a'.
- Type**: A dropdown menu with 'Standard' selected, annotated with a red circle 'b'.
- Description**: A text input field, annotated with a red circle 'c'.
- Subject**: A text input field, annotated with a red circle 'd'.
- Template Body**: A rich text editor area, annotated with a red circle 'e'. It includes a toolbar with options for font, size, bold, italic, underline, bulleted list, numbered list, link, and image. Below the toolbar, there are placeholder badges for 'Recipient Name' and 'Recipient Nickname', with a red box labeled 'Placeholders' pointing to them. The main text area contains the instruction: 'Start typing template text here. Drag and drop the available fields, as needed.' A red box labeled 'Text Editor' points to the main text area.

At the bottom of the form, there is a checkbox labeled 'Set As Default' and two buttons: 'Cancel' and 'Save'.














**EDIT TEMPLATE**

To edit an existing template:

- Click on the edit icon from within the **Manage Templates** screen.
- You can edit all the fields except for **Type** (note that it is grayed out and you cannot select the drop-down).
- Set as **Default**.

**Notes:**

- Once a type is selected for a template, it will remain as that type for its duration.
- Set as **Default** is only available when you have another template of the same type that is available to be set as the default template.
- Canned templates cannot be edited.

Actions	Template Name	Description	Template Type	Last Modified	Last Used	# of times used	Default Template
 	iProspect Multi Property Congratulatory	iProspect's multiple property congratulatory Email template	Property Multi	02/18/2022			 
 	iProspect Single Property Congratulatory V1	The first version of iProspect's single property email template including Co-Op.	Property Single	02/18/2022			
 	iProspect Single Property Congratulatory V2	The second version of iProspect's single property email template.	Property Single	02/18/2022			
 	iProspect Standard Email	iProspect's standard email template (Free form, Birthday, Anniversary, Nice Meeting You, etc.)	Standard	02/18/2022			

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




### Edit Email Template

**Name\***  **Type**

**Description**

**Subject**

**Template Body**

(inherited font) (inherited size) **A** **B** *I* U     

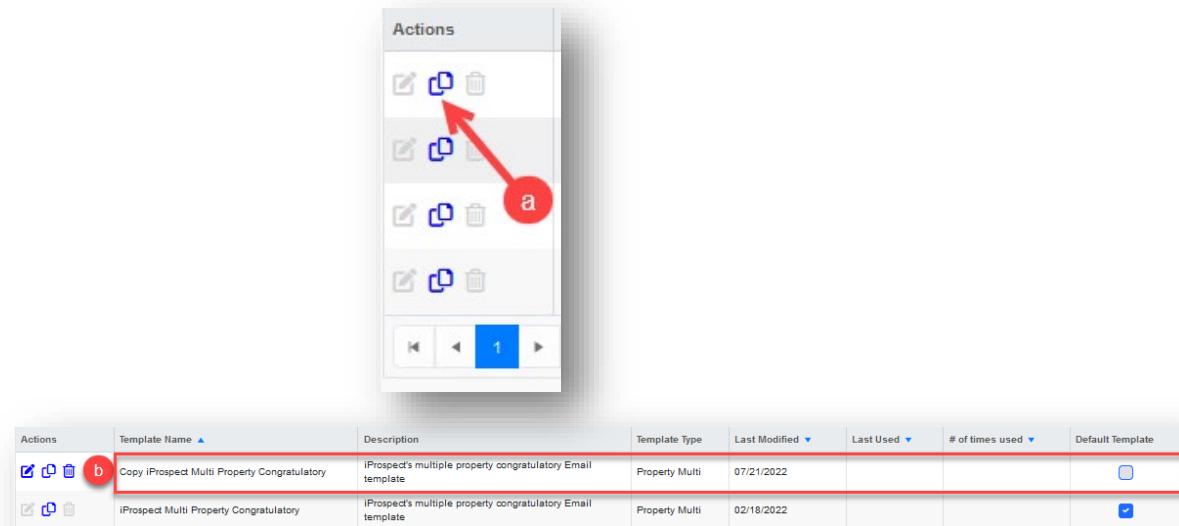
Recipient Name Recipient Nickname

Hi {{Recipient Nickname}},  
 Congratulations on your transactions!  
 What a great job, it is agents like you who inspire others to be their best selves in this business.  
 I'll be keeping an eye out for your future success. Wishing you only more growth in your business.

### COPY TEMPLATE

To make a copy of an existing template:

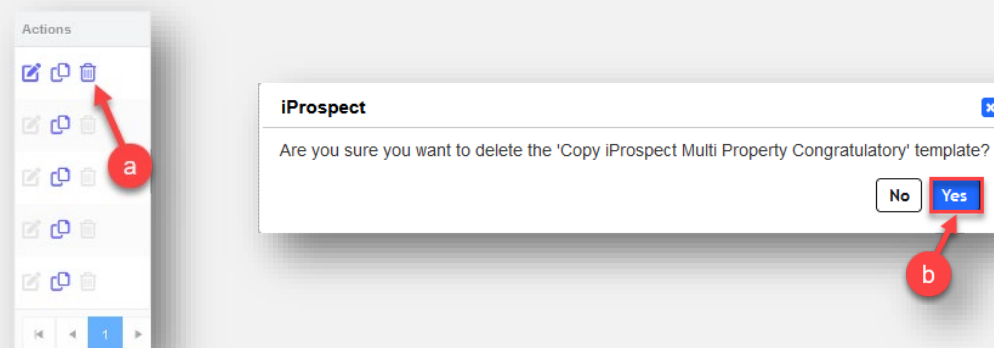
- Click the **Copy** action button.
- A copy of the template will immediately be created as a new record that you can then edit.



### DELETE TEMPLATE

To delete a template:

- From the **Manage Templates** screen, click the **Delete** button, to delete an existing template.
- A confirmation message will appear, asking you to confirm that you wish to delete the selected template. Select **Yes** to delete.





## USING EMAIL TEMPLATES

### Email Editor

When you open an email editor within iProspect, you will now notice a drop-down template list at the top right of the email body section.

- a. The content of the drop-down list changes depending on what type of email can be sent from this location within the application.
- b. The same drag and drop functionality introduced in **Manage Email Templates** is now available in the email editor. You can drag the placeholders into the email and the actual content will be injected into the email body, rather than the placeholder.
- c. When you drag down Recipient Name, **Adele** will display rather than “**{{Recipient Name}}**”.

The screenshot shows the 'E-mail Prospect' window with the following fields:

- To: adele.jones@adelerealty.com
- Cc: bharathraj.krishnappa@realogy.com
- Bcc: (empty)
- Subject: (empty)

The 'Email Body' section contains a rich text editor with the following elements:

- Font and size dropdowns: (inherited font) and (inherited size)
- Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Bulleted list, Numbered list, Indent, Outdent, Undo, Redo, and a placeholder for Recipient Name.
- Recipient Nickname: (empty)
- Hi Adele, (with a red arrow 'c' pointing to it)
- Sincerely, (with a red arrow 'b' pointing to it)

The 'Template:' dropdown menu is open, showing 'iProspect Standard Email' selected (with a red arrow 'a' pointing to it).

At the bottom of the window are buttons for 'Edit Signature', 'Add Signature', 'Cancel', and 'Send'.