

OnBoard Day 17 - Templates

It is now **Day 17** in your training, I have shown you how to customize your settings, how to add contacts, properties and transactions into the database as well as how to manually add items to the Calendar. You have learned most of data entry processes which are needed to move ahead. From this point forward, I will cover the automation aspects of Realvolve to help keep you organized and running like clockwork.

There are currently three modules that I consider as being part of the automation system of Realvolve which will be covered in the next few sessions.

1. **Templates:** The pre-written emails and text messages to send to contacts in the database.
2. **Workflows:** The pre-designed systems for handling your day-to-day processes.
3. **Google Sync:** The method of keeping the data in Realvolve in sync with other devices.

Today I will start by discussing what a template is and how to use them. A template is nothing more than a pre-designed **Email, SMS text, Facebook, Twitter** or **LinkedIn** message that can be sent to contacts at any time. Instead of writing a new message each time you communicate with your contact, simply pick a template containing the message you want to deliver to your contact and send it. This can be done manually using the email feature in Realvolve or by using an action on a workflow activity (which we will get to in the next email).

Setting up a standardized message is as easy as writing it from scratch except that you can include merge fields which get filled in to personalize the message before it is sent. You can use as many different merge fields as needed when creating your message.

TIP: There is a full list of all merge fields in Appendix B the **WorkflowTutorial.pdf** ([CLICK HERE](#))

Setting up templates for specified activities prior to setting up the Workflow will make the process flow easier. There will be places to select which email templates you need to send on an action and without the templates in place you will have challenges completing the workflow activity setup. Take the time now to create the Templates as needed. You might think about setting up a Lead Generation workflow which sends an email every day for 10 days to new leads. Creating the emails that you will send First will make the process easier when you want to go to setup the workflow.

To create a template do the following: ([SEE VIDEO](#))

1. On the top menu of Realvolve, click on **TEMPLATES** to display the template editor.
2. In the list view on the left, click on [**New Template**] > **Author a new template** > **Continue**

This creates a blank template area to enter your message.

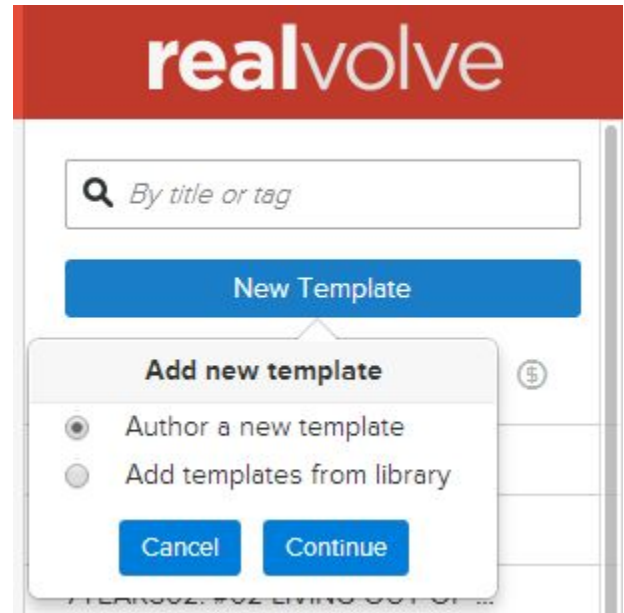
At the top of the Template Editor you must specify information in the following fields.

- **Title:** Name the template (used internally for menu selection)
- **Use with:** Specify which section of the Realvolve software that the template will be used. Choices are: Contact, Property or Transaction. This determines which merge fields will be available when you type 2 brackets “[[” and the field selection menu is displayed.
- **Via:** Select how this template will be sent. Choices are Email, Facebook, Linkedin, SMS or Twitter Message. Each message type has different requirements on maximum size and features. Emails can have images and attachments where other options are Text only.
- **Subject:** Emails require a subject of the message, other message types do not.

The **TAGS** field is optional but can be useful when searching for specific templates by keyword. I would recommend that you use keywords to help organize your templates from the beginning. Over time, you will create an extensive number of templates that could make it difficult to find without specific Keywords. Use Tags like “Thank You” for any type of Thank You letters or “Listing Expiration” for any templates dealing with expiration of a listing.

Each template that you create can use an unlimited number of Merge Fields. A Merge field is a placeholder that gets filled in with information from the database when the document is sent. The most important thing to understand is that the list of valid merge fields will be determined by the “**Use With**” field located in the upper section with the template setup. Selecting “**Contact**” in the "Use With" field will allow only the fields from a contact record. Use with “**Property**” will only show the Property or Listing fields, and “**Transaction**” will allow only the transaction fields. So understanding where your data will be coming from is important.

Merge fields can be placed in both the **subject line** and the **body** of the message. Simply place your cursor where you want the merge field to be placed and then type 2 bracket keys “[[” this will display



a list of merge fields that you can choose from. As you continue to type after the double brackets, the system will search the list for database field names that contain the text you are typing. If you type “**[[closing**” then the list will show all fields containing the word “closing” as shown below.

You can then scroll down through the list to click on the correct field you want displayed in your document. Once you select the field the entire field name will be displayed in the template which ends with double ending brackets “**]]**” like this: **[[Transaction#ClosingTime]]**

NOTE: Be sure to reference the **WorkflowTutorial.pdf** for detailed instructions for setting up templates.

Merge Fields Explained ([SEE VIDEO](#))

ACTION STEPS:

OK, so now it is your turn... Think about some of the previous emails that you have sent over the past couple weeks that could be made into templates and reused. Recreate them in realvolve using the steps we outlined above and in the videos. Start building your library of templates so that you have them when you need them.

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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