

eLead University

Templates

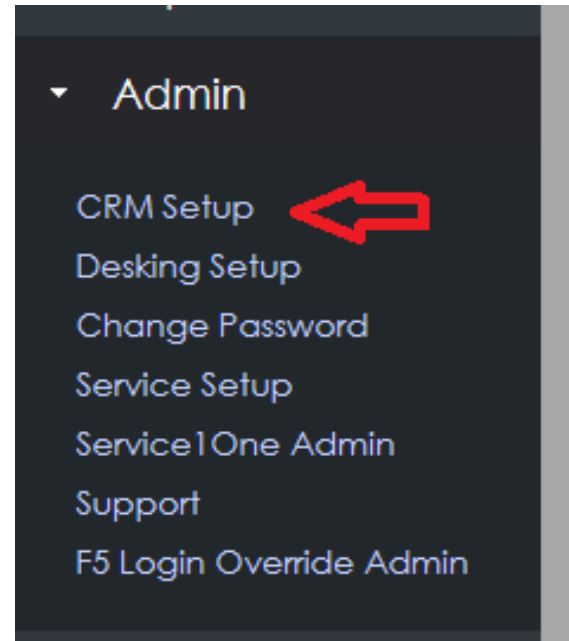
Creating a template

1. Click on Admin
2. Click on CRM Setup
3. Click on templates in Oppourtunity Management NOT Company Management



Oppourtunity Management

- Configure Sales Steps
- eLead Text Messaging Administration
- Management Escalation
- Skate Alert
- Templates
- Text Message Templates
- Workflows
- Workflows - OLD



4. Enter a Subject. Avoid using all caps or words like “free” as this will increase your spam score.

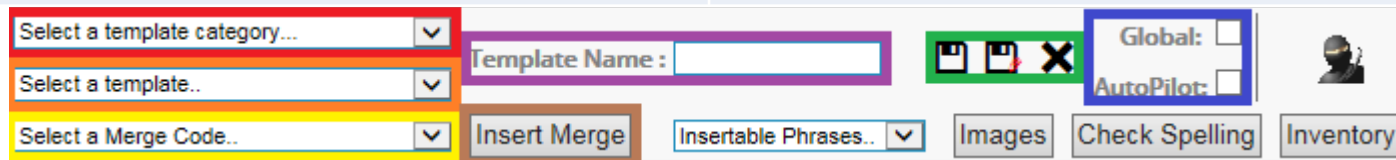
5. Select an opt out category. You can select multiple, but at least one must be selected. This will prevent the template being sent to customers who have declined receiving the selected email type.

6. Build your email in the template body

The screenshot shows an email template editor interface. The top section is labeled "HEADER" and contains a "Subject:" text input field. Below it, the "Categories:" section lists several options with checkboxes: "Special Sale (Service)", "Service Reminder", "Car Care Tips", "Recall Notice", "Birthday/Anniversary", and "Special Sale (Purchase)". The bottom section is labeled "BODY" and features a toolbar with various editing tools. A red arrow points from the text in step 5 to the "Categories:" section. A blue arrow points from the text in step 4 to the "Subject:" field. Another blue arrow points from the text in step 6 to the "BODY" section.

Template tools

Template Category	Select the category to pull template from.
Template	Select an individual template
Merge code	Codes to pull info from the customer profile
Template name	Internal name for a template
Save, Save as, Delete	Template save and delete admin
Global/ autopilot	Changes visibility of teplate



Insert Merge finalizes merge insertions when one is selected

Insertable Phrases	Place for commonly used phrases without a merge code
Images	Place to upload images
Check Spelling	Checks speeling
Inventory	Inserts inventory
Spam Ninja	Rates the template against common spam filters

Select a template category...
 Select a template..
 Select a Merge Code..



Template Name :



 Global:
 AutoPilot:



Spam Ninja



The Spam Ninja gives you a score based on how likely your email is to hit a spam filter trigger. The lower the score the better. Spam scores are represented like:

  Email unlikely to be filtered as spam

  Email may be filtered as spam

  Email will be filtered as spam

Be sure to click the spam Ninja before sending an email to make sure customers are receiving your emails.

Template Body tools

- Most of these are familiar as they are, by and large, the same general tools you see in word.
- Source tools allow you to View **Source**, **Create new**, **Preview** and **Print**.
- Copy tools allow you to **Cut**, **Copy**, **Paste**, **Paste in plain text** and **from Word** and **Redo/Undo**.
- Font tools allow to **Embolden**, **Italicize**, **underline**, **scratch**, **add super and subtext**, and **remove all current modifiers**.
- Paragraph options allow you to **insert lists**, **Indent**, **Quote**, **Create a Div Container**, **Justify** and **assign text direction**.

