Using Templates for Common Communication

Templates allow you to build a set of standard emails for corresponding with guests. You can use a variety of tags to build your templates and pull necessary information from an inquiry or a property search into an email to a guest.

Complete the following steps to access templates:

1. Select Reservations > Lead Management > Inquiry Inbox to display the Inquiry Inbox.
2. On the top left of the Inquiry Inbox, click the arrow next to Inquiry Inbox and select Settings to display the Settings pages.
3. Click Templates to display the Templates page.

Escapia provides two standard templates you can use as references: Available and Not Available. These templates contain text and tags and are examples of some of the template features you can use. You can edit these templates and tailor them to your needs.

The Templates page contains the following options you can use to interact with templates:

- **New template** - Creates a new, blank template. You can enter text and add tags to build a new template from scratch.
- **Copy** - Creates a copy of the template, which you can then edit.
- **Edit/View** - Opens the template for editing, or to view the template.
- **Delete** - Deletes the template. Once you delete a template, it is no longer available to use or to access.

**Adding Tags into a Template**

You can add tags to pull information from an inquiry or property search into an email to a guest. Tags operate like placeholders that automatically populate an email with the appropriate personalized information from your system.

Complete the following steps to add a tag into a template:

1. Place the cursor in the body of the template where you want to use a tag.
2. Click Insert tag to display the Add template tag dialog box.
3. Click the triangle next to a tag category to display the list of tags in that category.
4. On the right side of the dialog box, click the blue tag you want to add into the template.
5. The tag is inserted into the template.
Understanding Tags

The following list shows the available tags and explains their functions:

<table>
<thead>
<tr>
<th>Tag Category</th>
<th>Tag Title</th>
<th>Tag</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest Name</td>
<td>First Name</td>
<td>[firstname]</td>
<td>The guest’s first name from the inquiry</td>
</tr>
<tr>
<td></td>
<td>Last Name</td>
<td>[lastname]</td>
<td>The guest’s last name from the inquiry</td>
</tr>
<tr>
<td></td>
<td>Full Name</td>
<td>[fullname]</td>
<td>The guest’s full name from the inquiry</td>
</tr>
<tr>
<td>Dates</td>
<td>Today</td>
<td>[today]</td>
<td>Today’s date</td>
</tr>
<tr>
<td></td>
<td>Stay dates</td>
<td>[staydates]</td>
<td>The <strong>Check in and Check out</strong> dates used in the property search</td>
</tr>
<tr>
<td>Property</td>
<td>Property name</td>
<td>[propertyname]</td>
<td>The <strong>Friendly Unit Name</strong></td>
</tr>
<tr>
<td>Quotes</td>
<td>Quote details</td>
<td>[quotedetails]</td>
<td>Details of the quote being emailed to the guest, including pricing information and more</td>
</tr>
<tr>
<td>Company</td>
<td>Company name</td>
<td>[company]</td>
<td>The company name, as entered in <strong>Admin &gt; Setup &gt; Business</strong></td>
</tr>
<tr>
<td></td>
<td>Company phone</td>
<td>[companyphone]</td>
<td>The primary phone number, as entered in <strong>Admin &gt; Setup &gt; Business</strong></td>
</tr>
<tr>
<td></td>
<td>Company email</td>
<td>[companyemail]</td>
<td>The primary email address, as entered in <strong>Admin &gt; Setup &gt; Business</strong></td>
</tr>
<tr>
<td>LMS User</td>
<td>First name</td>
<td>[lmsuserfirstname]</td>
<td>The first name of the logged in user sending the correspondence</td>
</tr>
<tr>
<td></td>
<td>Last name</td>
<td>[lmsuserlastname]</td>
<td>The last name of the logged in user sending the</td>
</tr>
</tbody>
</table>
Using a Template to Email a Quote or Unit Availability Information

Complete the following steps to use a template to send a quote to a guest:

1. From the Inquiry Inbox, click the inquiry you want to open.
2. In the unit search box to the left of the inquiry, enter Check in and Check out dates and any other search criteria you choose.
3. Click Search to display a list of units.
4. Click email next to the unit you choose to display the Message page.
5. Click the Use template pull-down menu to view a list of templates.
6. Select the template you want to use, such as Available.
7. Make any changes you want to the body of the email.
8. Notice that the [quotedetails] tag is not yet populated with any information. Scroll down to the Attachments section to choose the charges and fees you want to include in the quote.
   Note: In order to email quotes successfully, each unit must have a Property URL entered on the Details tab in Open Unit. The Property URL should be a link to the unit on your website.
9. Click Send to send the quote to the primary email address that you have on file for the guest. A copy of the sent message is saved in the Messages tab of the inquiry.