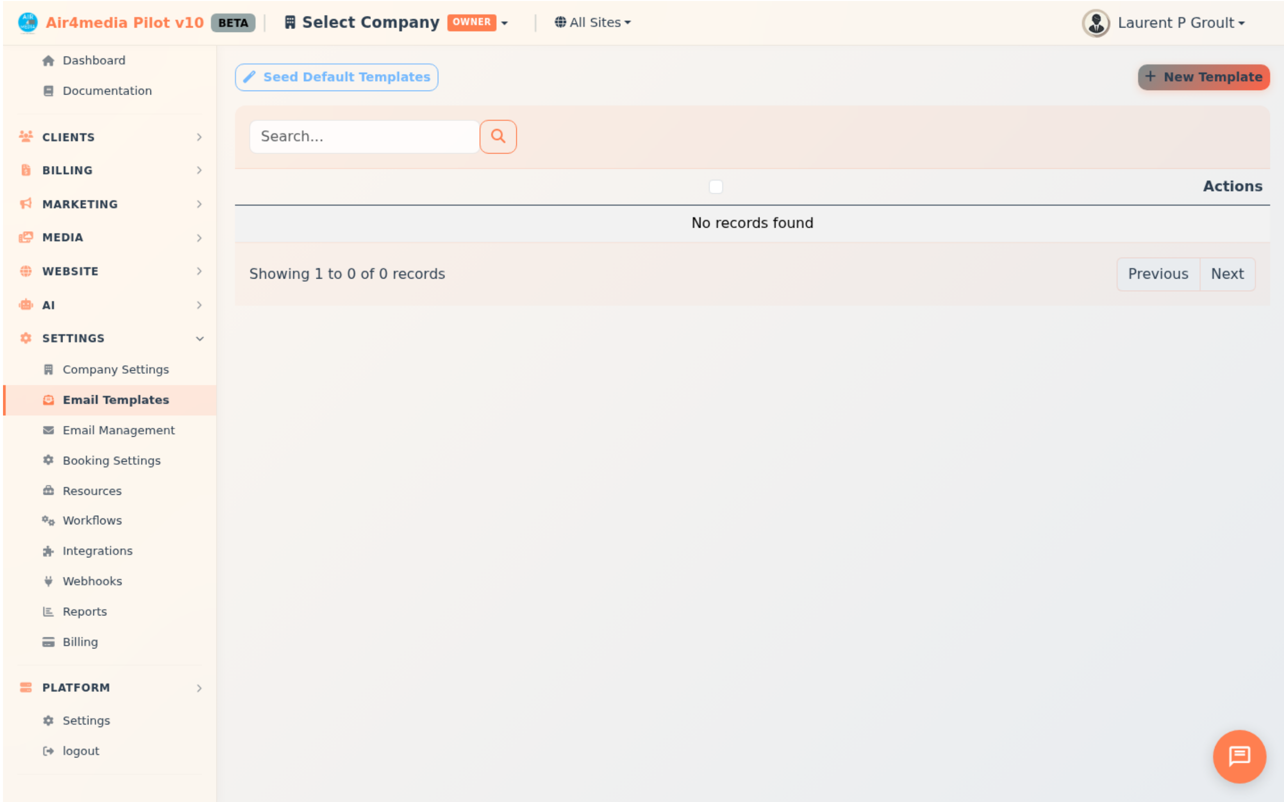


# Email Templates

Create and manage reusable email templates for your CRM workflow — quotes, contracts, invoices, appointments, and more.

## Key Features

- **Template Library**: Store all your standard emails in one place, organized by category
- **Merge Variables**: Automatically personalize emails with contact names, project details, quote amounts, invoice numbers, and more
- **Live Preview**: See exactly how your email will look with real sample data before using it
- **Categories**: Organize templates by type — Quotes, Contracts, Invoices, Appointments, Portal, and General
- **Duplicate**: Copy any template as a starting point for a new one
- **Default Templates**: Load a set of professionally written templates to get started instantly

## How to Use

## Creating a Template

1. Click **New Template** in the top right
2. Enter a template name (used internally to identify it)
3. Choose a category from the dropdown
4. Write your subject line — you can include merge variables like `{{contact.first_name}}`
5. Write the email body in the text area — HTML formatting is supported
6. Click variable chips in the right panel to insert them at your cursor position
7. Click **Preview** to see how the email looks with sample data filled in
8. Click **Save Template**

## Using Variables

The variables panel (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 variable chip to insert it directly into the email body at the current cursor position.

## Loading Default Templates

Click **Seed Default Templates** to automatically create 10 pre-built templates covering the most common CRM scenarios — quote sent, invoice ready, contract signing, appointment confirmation, follow-up, and more. Any templates that already exist are skipped.

## Managing Templates

Each template in the list has four actions:

- **Edit** — open the editor to modify the template
- **Duplicate** — create a copy to use as a starting point

- **Preview** — preview the rendered email with sample data
- **Delete** — permanently remove the template

Use the **Category** filter to narrow the list, or use the search bar to find templates by name or subject line.

## Tips

- Use descriptive names so you can quickly find the right template when sending emails
- The preview feature fills in realistic sample data so you can check formatting and layout before sending
- Mark templates as **Inactive** if you want to keep them but hide them from use
- Duplicate an existing template and tweak it rather than starting from scratch for similar emails