

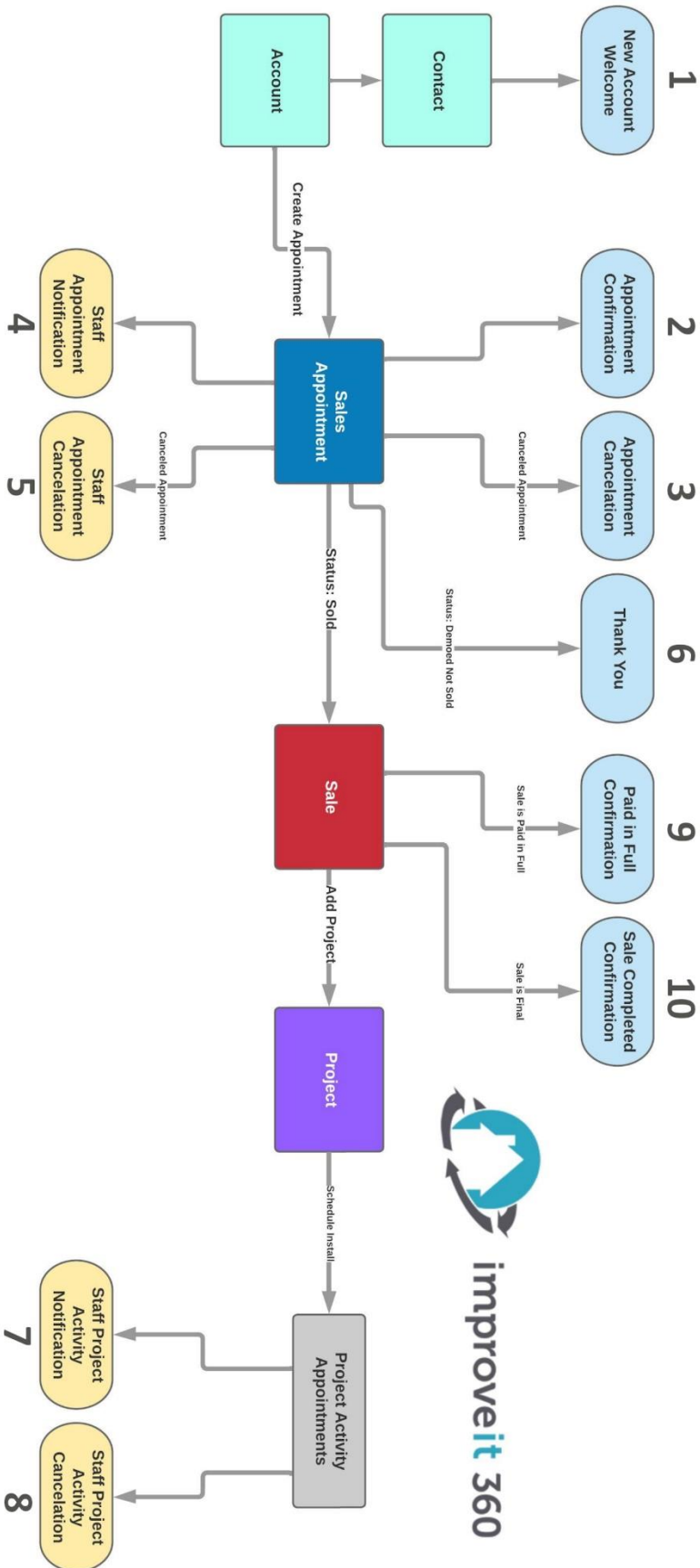
Lifecycle Email Communications Guide

This guide provides you both a summary of the automated emails available in your improveit 360 system and the details associated with each email. Prior to your company’s “Go-Live” with improveit 360, your team should review this document and work with your Onboarding Specialist to activate the email automations needed for your business.

You may also decide that you want to “Go-Live” with improveit 360 without using these automated emails and activate some, or all of them, at a later date.

#	Name	Type	Folder
1	New Account Welcome	Email	Public Email Templates
2	Account Appointment Confirmation (to Contact)	Email	Public Email Templates
3	Account Appointment Cancelation (to Contact)	Email	Public Email Templates
4	Staff Appointment Notification	Email	Public Email Templates
5	Staff Appointment Cancelation	Email	Public Email Templates
6	Thank You (post- Sales Appointment)	Email	Public Email Templates
7	Staff Project Activity Notification	Email	Public Email Templates
8	Staff Project Activity Cancelation	Email	Public Email Templates
9	Paid in Full Confirmation	Email	Public Email Templates
10	Sale Completed Confirmation	Email	Public Email Templates
11	eLead Conversion Issue Notification	Email	Public Email Templates
12	New User Welcome and Login	Email	Public Email Templates

Note: Fields noted by **yellow** highlight throughout the document are Merge Fields pulled from the data in your improveit 360 system.



Email Communication #1: New Account Welcome Email

Summary

When a new Account is entered in your system, you can check a checkbox to send the Contact the New Account Welcome Email below.

Subject: Thanks {{{Account.i360core__Contact_Name__c}}}, for your interest in {{{Organization.Name}}}

Template

Dear {{{Account.i360core__Contact_Name__c}}},

Thank you for your recent request for information about our products and services! We've added you to our mailing list so you can receive updates and special promotions on the products we offer.

If you have any questions or need additional information, don't hesitate to reach out to us directly at {{{Organization.Phone}}}.

We hope to exceed your expectations and look forward to working with you soon!

Sincerely,

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

Email Communication #2: Appointment Confirmation Email

Summary

When an Appointment is scheduled, you can check a checkbox to send the Contact the Appointment Confirmation Email below.

Subject: Your Appointment on {{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}}}
with {{{Organization.Name}}}

Template

Dear {{{i360core__Sales_Appointment__c.i360core__Contact_Name__c}}},

Thank you for your interest in {{{i360core__Sales_Appointment__c.i360core__Product_Categories__c}}}.

This email confirms your appointment on

{{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}}}, at the following location:

{{{i360core__Sales_Appointment__c.i360core__Street_Address__c}}},

{{{i360core__Sales_Appointment__c.i360core__City__c}}},

{{{i360core__Sales_Appointment__c.i360core__State_Province__c}}}

{{{i360core__Sales_Appointment__c.i360core__Zip_Postal_Code__c}}}

Add this appointment to your digital calendar using the e-invitation attached to this message.

If you need to reschedule this appointment, please contact our office at {{{Organization.Phone}}}.

Thank you,

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

(VCalendar is attached)

Email Communication #3: Appointment Cancellation Notification

Summary

When an Appointment is canceled you can check a checkbox to send the Contact the Appointment Cancellation Notification email below.

Subject: Appointment Cancellation for

{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}} with
{{Organization.Name}}

Template

Dear {{i360core__Sales_Appointment__c.i360core__Contact_Name__c}},

This email is to confirm **cancellation** of your appointment that was scheduled to occur on
{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}}.

We will be contacting you to reschedule your appointment. We thank you for your interest in our products and services.

{{Organization.Name}}

{{Organization.Address}}

{{Organization.Phone}}

Email Communication #4: Staff Appointment Notification

Summary

When an Appointment is schedule for a Sales Rep you can send the Sales Rep the Staff Appointment Notification email below.

Subject: Appointment scheduled for:

{{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}}}

Template

An appointment has been set for you, please see the details below:

TYPE:

Sales Appointment

DATE/TIME: {{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}}}

DURATION: {{{i360core__Sales_Appointment__c.i360core__Duration__c}}} hours

REP 1: {{{i360core__Sales_Appointment__c.i360core__Sales_Rep_1_Name__c}}}

REP 2: {{{i360core__Sales_Appointment__c.i360core__Sales_Rep_2_Name__c}}}

NAME: {{{i360core__Sales_Appointment__c.i360core__Contact_Name__c}}}

ADDRESS:

{{{i360core__Sales_Appointment__c.i360core__Street_Address__c}}},

{{{i360core__Sales_Appointment__c.i360core__City__c}}},

{{{i360core__Sales_Appointment__c.i360core__State_Province__c}}}

{{{i360core__Sales_Appointment__c.i360core__Zip_Postal_Code__c}}}

PHONE:

{{{i360core__Sales_Appointment__c.Contact_Phone__c}}}

If for some reason you are unable to run this Appointment, contact your Manager ASAP.

Add this appointment to your personal calendar using the e-invitation attached to this message. (VCalendar is attached)

Thank You,
Scheduling Team

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

Email Communication #5: Staff Appointment Cancellation

Summary

When an Appointment has been assigned to a Rep and the customer Cancels their Appointment, this email is can be sent to notify the Sales Rep of the Appointment Cancellation.

Subject: CANCELED - Appt on {{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}}} with {{{i360core__Sales_Appointment__c.i360core__Contact_Name__c}}}

Template

The following appointment has been CANCELED

TYPE: Sales Appointment

DATE/TIME: {{{i360core__Sales_Appointment__c.i360core__Appointment_Date_Time__c}}}

DURATION: {{{i360core__Sales_Appointment__c.i360core__Duration__c}}} hours

REP 1: {{{i360core__Sales_Appointment__c.i360core__Sales_Rep_1_Name__c}}}

REP 2: {{{i360core__Sales_Appointment__c.i360core__Sales_Rep_2_Name__c}}}

NAME: {{{i360core__Sales_Appointment__c.i360core__Contact_Name__c}}}

ADDRESS:

{{{i360core__Sales_Appointment__c.i360core__Street_Address__c}}},

{{{i360core__Sales_Appointment__c.i360core__City__c}}},

{{{i360core__Sales_Appointment__c.i360core__State_Province__c}}}

{{{i360core__Sales_Appointment__c.i360core__Zip_Postal_Code__c}}}

PHONE:

{{{i360core__Sales_Appointment__c.Contact_Phone__c}}}

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

Email Communication #6: Thank You Email

Summary

When an Appointment has been Resulted as “Demoed, Not Sold” an email can be sent to the Contact, thanking them for the opportunity to meet and pitch your products.

Subject: Thanks for your time today!

Template

Dear {{{i360core__Sales_Appointment__c.i360core__Contact_Name__c}}},

Thank you for the opportunity to showcase our products and services! I enjoyed meeting with you.

Since we are constantly reacting to industry trends, new products, and changes in the marketplace, I will keep in touch with the hope that in the near future, we'll be able to meet your needs.

If you have any questions or need additional information, feel free to contact us at {{{Organization.Phone}}}.

Sincerely,

{{{i360core__Sales_Appointment__c.i360core__Sales_Rep_1_Name__c}}}

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

Email Communication #7: Staff Project Activity Notification

Summary

When a Project Activity Appointment has been assigned, an email can be sent to the Assigned To staff member, notifying them a Project Appointment has been assigned to them.

Subject: Appt on {{{i360core__Project_Activity__c.i360core__Start__c}}} with {{{i360core__Project_Activity__c.i360core__Contact_Name__c}}}, for {{{i360core__Project_Activity__c.Name}}}

Template

A project activity has been assigned to you, please see the details below:

{{{i360core__Project_Activity__c.i360core__Project_Name__c}}}

Customer Information

NAME {{{i360core__Project_Activity__c.i360core__Contact_Name__c}}}

ADDRESS {{{i360core__Project_Activity__c.i360core__Project_Address__c}}}

PHONE {{{i360core__Project_Activity__c.Contact_Phone__c}}}

SOLD ON {{{i360core__Project_Activity__c.i360core__Sold_On__c}}}

TOTAL {{{i360core__Project_Activity__c.i360core__Sale_Amount__c}}}

Special Instructions/Directions

{{{i360core__Project_Activity__c.i360core__Description__c}}}

Other Information

DATE/TIME {{{i360core__Project_Activity__c.i360core__Start__c}}}

PROJECT MANAGER {{{i360core__Project_Activity__c.i360core__Project_Manager__c}}}

ASSIGNED TO {{{i360core__Project_Activity__c.i360core__Assigned_To_Name__c}}}

SALES REP {{{i360core__Project_Activity__c.i360core__Sales_Rep_1__c}}}

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

Email Communication #8: Staff Project Activity Cancelation

Summary

When a Project Activity Appointment has been Canceled, an email can be sent to the Assigned To staff member, notifying them the Project Appointment has been Canceled.

Subject: CANCELED - Appt on {{{i360core__Project_Activity__c.i360core__Start__c}}} with {{{i360core__Project_Activity__c.i360core__Contact_Name__c}}}, for {{{i360core__Project_Activity__c.Name}}}

Template

A project activity assigned to you has been **canceled**. Please see the details below:

{{{i360core__Project_Activity__c.i360core__Project_Name__c}}}

Customer Information

NAME {{{i360core__Project_Activity__c.i360core__Contact_Name__c}}}

ADDRESS {{{i360core__Project_Activity__c.i360core__Project_Address__c}}}

PHONE {{{i360core__Project_Activity__c.Contact_Phone__c}}}

SOLD ON {{{i360core__Project_Activity__c.i360core__Sold_On__c}}}

TOTAL {{{i360core__Project_Activity__c.i360core__Sale_Amount__c}}}

Other Information

DATE/TIME {{{i360core__Project_Activity__c.i360core__Start__c}}} - **Canceled**

PROJECT MANAGER {{{i360core__Project_Activity__c.i360core__Project_Manager__c}}}

ASSIGNED TO {{{i360core__Project_Activity__c.i360core__Assigned_To_Name__c}}}

SALES REP {{{i360core__Project_Activity__c.i360core__Sales_Rep_1__c}}}

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}



Email Communication #9: Paid in Full Confirmation

Summary

When a Sale Status is changed to Paid in Full this email can be sent as a receipt for the homeowner to keep for their records.

Subject: Confirmation - Order Paid in Full

Template

Dear {{{i360core__Sale__c.i360core__Contact_Name__c}}},

Thank you for your recent payment. The following order has been paid in full:

Sale ID: {{{i360core__Sale__c.Id}}}

Sale Name: {{{i360core__Sale__c.Name}}}

Sold Price: {{{i360core__Sale__c.i360core__Total__c}}}

Total Received: {{{i360core__Sale__c.i360core__Total_Payments__c}}}

Balance Due: {{{i360core__Sale__c.i360core__Balance_Due__c}}}

Please save this email for your records. Keep us in mind for any future projects!

Thank You,

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}



Email Communication #10: Sale Completed Confirmation

Summary

When a Sale Status is changed to Final this email can be sent to ask for referrals, ask for a review, or make cross-selling suggestions.

Subject: Thank You for Your Business!

Template

Dear {{{i360core__Sale__c.i360core__Contact_Name__c}}},

We strive to provide superior workmanship in every project we complete here at {{{Organization.Name}}}. Our customers are central to the success of our business, and it is our pleasure to help improve the longevity of our customers' homes.

If you are happy with the work that has been completed, we ask that you recommend us to your friends, family, and neighbors, by leaving us a positive review. Our satisfied customers are our biggest advocates!

We greatly value your business and look forward to working with you again in the future!

Thank You,

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

Email Communication #11: eLead Conversion Issue Notification

Summary

When an eLead cannot be successfully converted to an Account and Contact, this email can be sent to a member of your team to notify them, manual intervention will be needed to convert the eLead.

Subject: eLead Conversion Issue - {{{i360core__eLead__c.i360core__First_Name__c}}}
{{{i360core__eLead__c.i360core__Last_Name__c}}}

Template

Dear {{{i360core__eLead__c.i360core__Owner_Name__c}}},

An eLead has failed to convert. Please review this eLead to determine why it was unable to be converted.

Id: {{{i360core__eLead__c.Id}}}

Name: {{{i360core__eLead__c.i360core__First_Name__c}} {{{i360core__eLead__c.i360core__Last_Name__c}}}

Sincerely,

{{{Organization.Name}}}

{{{Organization.Address}}}

{{{Organization.Phone}}}

Email Communication #12: New User Welcome Email

Summary

When a new User is Activated within the system, the system will send them this email.

Subject: Welcome to the CRM platform for {{{Organization.Name}}}

Template

Dear {{{i360core__Staff__c.Name}}},

Click the link below to setup your Login credentials. Be sure to set your security question and your password within 24 Hours. This link will expire!

<https://login.salesforce.com/>



We recommend bookmarking our [Help Center](#)!

If you have any questions or need additional information, don't hesitate to reach out to us directly at {{{Organization.Phone}}}.

We hope to exceed your expectations and look forward to working with you soon!

Sincerely,

{{{Organization.Name}}}
{{{Organization.Address}}}
{{{Organization.Phone}}}

To Activate or Deactivate these email automations, navigate to **Setup**

Go to the **Flows** menu

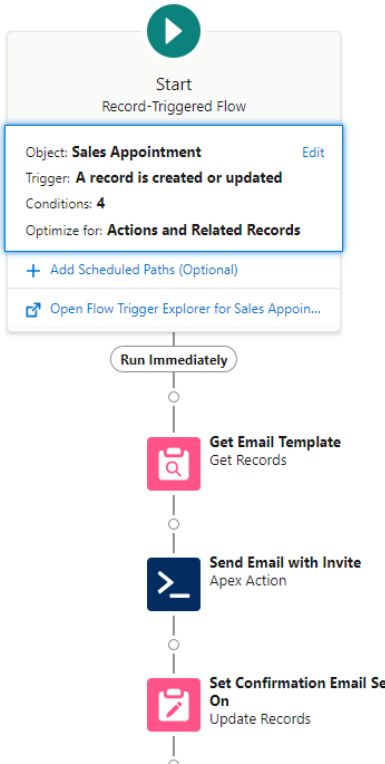
Flow Definitions
All Flows ⌵ ⚙️ 🔄 ⌵

41 items • Sorted by Last Modified By • Filtered by All flow definitions • Updated a minute ago

Flow Label	Process Type	Active	Tem...	Package State	Pac...	Last Modified By	Last Modified D...
Cancel Sale	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		improveit 360 Lightning Platform	8/25/2023, 9:40 AM
Quote Template Item After Trigger	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		improveit 360 Lightning Platform	8/25/2023, 9:41 AM
Project Template Activity After Trigger	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		improveit 360 Lightning Platform	8/25/2023, 9:41 AM
Project Activity After Trigger	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		improveit 360 Lightning Platform	8/25/2023, 9:41 AM
Staff Appointment Notification Email	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Emma Heiberger	7/14/2023, 1:40 PM
Staff Appointment Cancellation Email	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Emma Heiberger	7/12/2023, 12:19 PM
Sale Completed Confirmation Email	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Emma Heiberger	7/19/2023, 12:18 PM
Paid In Full Confirmation Email	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Emma Heiberger	7/19/2023, 12:18 PM
Example - Outbound Text (Trigger)	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unmanaged		Emma Heiberger	4/28/2023, 4:04 PM
Example - Outbound Text (Invocable Method)	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unmanaged		Emma Heiberger	4/28/2023, 4:04 PM
Example - Inbound Text	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Unmanaged		Emma Heiberger	4/28/2023, 4:04 PM
Account Welcome Email	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Emma Heiberger	4/28/2023, 4:04 PM
Account Appointment Confirmation Email	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Emma Heiberger	7/19/2023, 12:18 PM
Account Appointment Cancellation Email	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Emma Heiberger	7/19/2023, 12:18 PM
Verify Identity	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Click on the **Name** of the Email automation you'd like to Activate.
 In the upper-right corner of the Flow Builder, click **Activate**.

Auto-Layout ⌵ Version 1: Deactivated—Last modified 2 months ago Run Debug View Tests Activate Save As



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graph TD
    Start[Start  
Record-Triggered Flow] --> RunImmediately[Run Immediately]
    RunImmediately --> GetEmailTemplate[Get Email Template  
Get Records]
    GetEmailTemplate --> SendEmail[Send Email with Invite  
Apex Action]
    SendEmail --> SetConfirmation[Set Confirmation Email Sent On  
Update Records]
  
```