

Lifecycle Text Communications Guide

This guide provides you both a summary of the text message templates available in your improveit 360 system and the detailed fields associated with each text. Prior to your company’s “Go-Live” with improveit 360, your team should review this document and work with your Onboarding Specialist to create any automation needed for your business*.

* Automated Text messaging is an additional setup fee.

You may also decide that you want to “Go-Live” with improveit 360 without automating text messages and later determine you would like to automate them.

#	Name	Type	Folder
1	Sales Opportunity - Sample	Email	Texting Templates
2	Sales Appointment – Appointment Scheduled	Email	Texting Templates
3	Sales Appointment – Reminder	Email	Texting Templates
4	Sales Appointment – 24 Hours After Appointment (Not Sold)	Email	Texting Templates
5	Contact – Follow-up Message	Email	Texting Templates
6	Sale – Payment Link Text	Email	Texting Templates
7	Project – Payment Link Text	Email	Texting Templates
8	Contact – Custom Feedback Request	Email	Texting Templates

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

Text Communication #1: Sales Opportunity - Sample

Summary

When a new Sales Opportunity is created, send this text message to the Contact related to the new Sales Opportunity using the Texting Component.

NOTE: If your company is creating multiple Sales Opportunities for one Inquiry, you may want to consider a custom text message sent off the Inquiry record instead of sending multiple Text messages for each Product Category of Interest.

Template

Hi {{{Recipient.Name}}}, this is {{{Sender.FirstName}}} with {{{Organization.Name}}}. Thank you for your interest in {{{i360core__Sales_Opportunity__c.i360core__Interested_In__c}}}.

Text Communication #2: Sales Appointment – Appointment Scheduled

Summary

When an Appointment is scheduled, you can send the Contact the Appointment Scheduled Text message below by using the Texting Component.

Template

Your appointment has been scheduled for

{{{i360core__Sales_Appointment__c.i360core__Local_Start_Date_Time_Short__c}}}.

{{{i360core__Sales_Appointment__c.i360core__Sales_Rep_1_Name__c}}} is looking forward to meeting with you. Reply "C" to confirm.



Text Communication #3: Sales Appointment - Reminder

Summary

Prior to the Appointment Time, you can send this text from the Texting Component, or have improveit 360 send it automatically 1 Hour prior to the Appointment Time*.

Template

Hi {{{Recipient.FirstName}}}, this is a friendly reminder about your upcoming appointment with {{{Organization.Name}}} on {{{i360core__Sales_Appointment__c.i360core__Local_Start_Date_Time_Short__c}}}. See you soon!

Text Communication #4: Sales Appointment – 24 Hours After Appointment (Not Sold)

Summary

24 Hours After an Appointment Date/Time if the Appointment was Resulted as Not Sold, improveit 360 can automatically send this message*. Your team can manually send this message from the Texting Component anytime after the Appointment has been Resulted.

Template

Thank you for meeting {{{i360core__Sales_Appointment__c.i360core__Sales_Rep_1_Name__c}}} yesterday! We appreciate the opportunity to showcase our services and hope to work with you in the future.

Text Communication #5: Contact – Follow-up Message

Summary

This message can be sent to a Contact after a Sale was made, or at anytime throughout the customer lifecycle by manually using the Texting component.

Template

Hi {{{Recipient.FirstName}}}, we hope you're enjoying your recent purchase from {{{Organization.Name}}}. If you have any questions or need assistance, please don't hesitate to reach out.



Text Communication #6: Sale – Payment Link Text

Summary

This message is sent from the Sale object and includes a [PaySimple Payment Link](#) for the consumer to click to make a one-time payment using the [PaySimple Integration](#) with improveit 360.

Template

Hi {{{i360core__Sale__c.i360core__Contact_Name__c}}}, thank you for being a valued customer of {{{Organization.Name}}}. Make a payment online here:
{{{i360core__Sale__c.i360core__Most_Recent_Payment_Link_URL__c}}}

Text Communication #7: Project – Payment Link Text

Summary

This message is sent from the Project object and includes a [PaySimple Payment Link](#) for the consumer to click to make a one-time payment using the [PaySimple Integration](#) with improveit 360.

Template

Hi {{{i360core__Project__c.i360core__Contact_Name__c}}}, thank you for being a valued customer of {{{Organization.Name}}}. Make a payment online here:
{{{i360core__Project__c.i360core__Most_Recent_Payment_Link_URL__c}}}

Text Communication #8: Contact – Customer Feedback Request

Summary

This message can be sent to a Contact after a Sale or Project is Completed, or at anytime throughout the customer lifecycle by manually using the Texting component.

Template

Hi {{{Recipient.FirstName}}}, we value your opinion. Could you please take a moment to rate your recent experience with {{{Organization.Name}}}?

Activate or Deactivate automations*

NOTE: This only applies to text messages with custom Flows to automate when those text message templates are sent to a Contact. Out of the box, none of the Text Message Templates have automation to send them automatically.

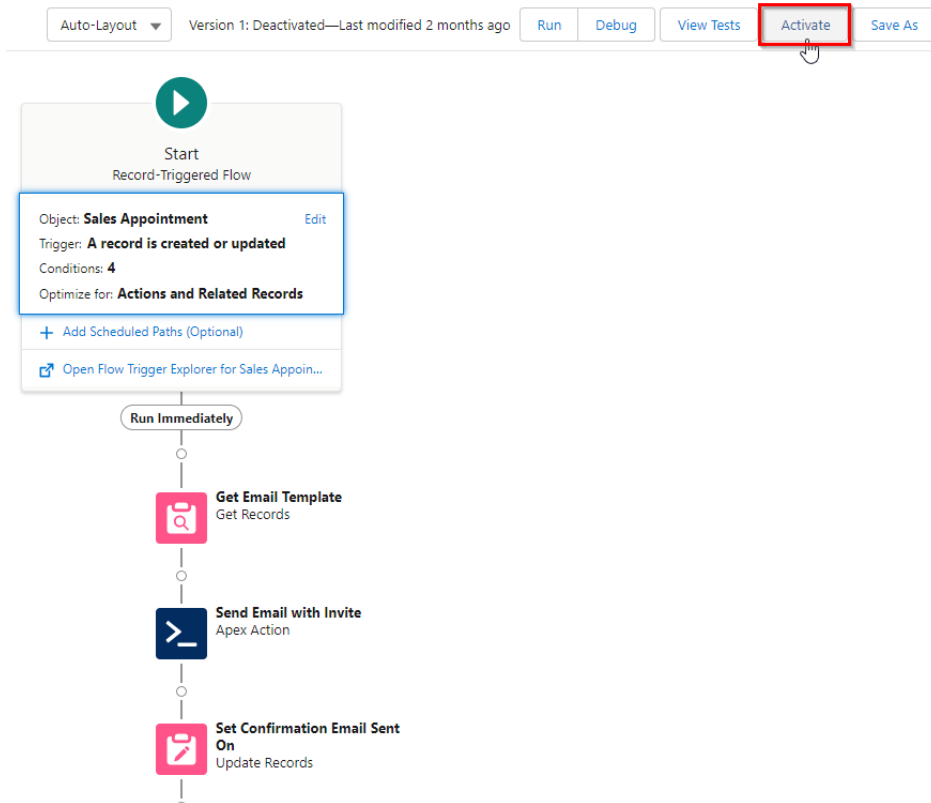
Navigate to Setup

Go to the **Flows** menu, search for Flows with the word “Text” in the name.

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 Text automation you’d like to Activate.

In the upper-right corner of the Flow Builder, click **Activate/Deactivate**.



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

Start
Record-Triggered Flow

Object: **Sales Appointment** Edit
Trigger: **A record is created or updated**
Conditions: **4**
Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Sales Appoin...

Run Immediately

Get Email Template
Get Records

Send Email with Invite
Apex Action

Set Confirmation Email Sent On
Update Records