

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.

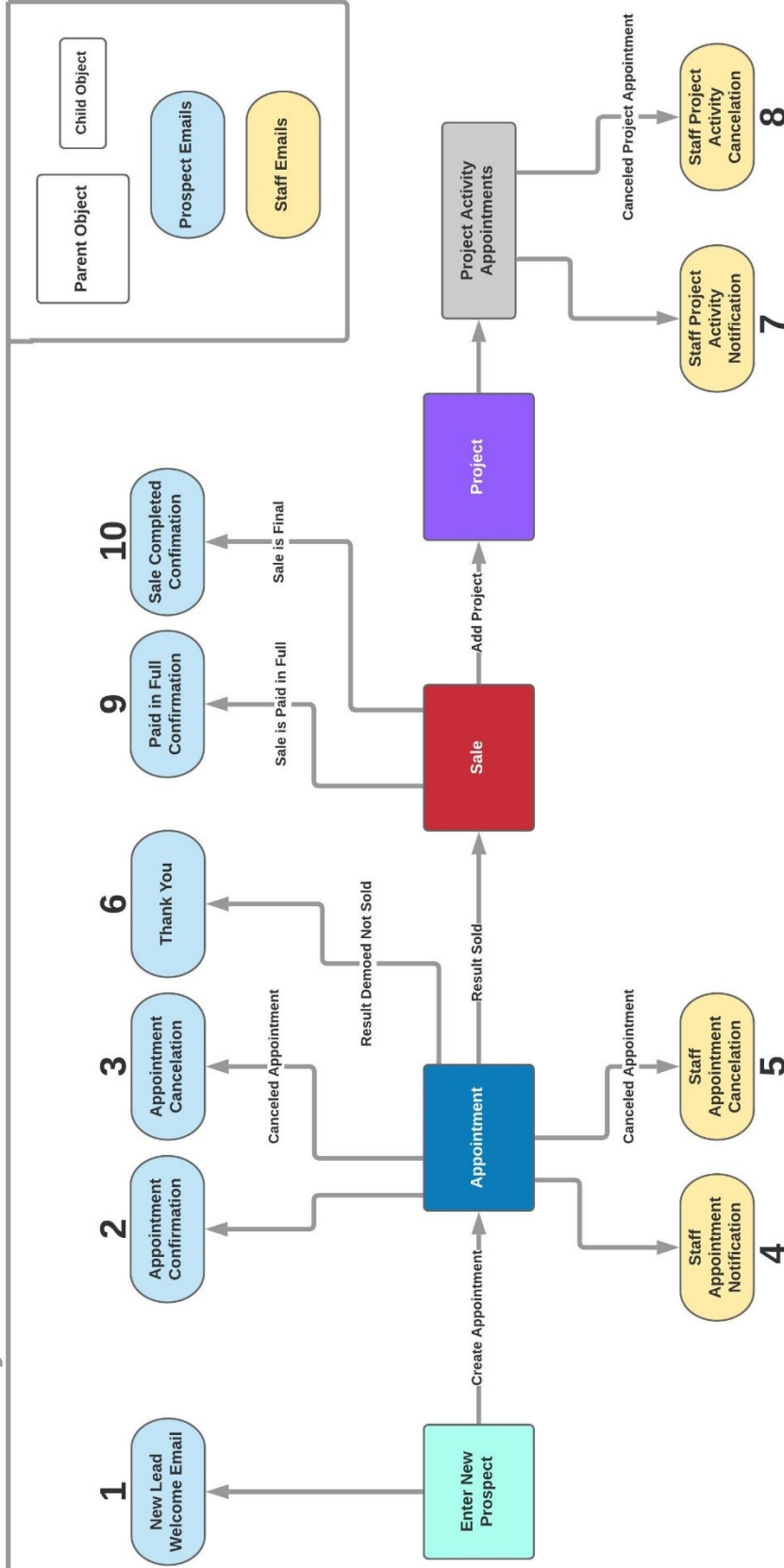
You may also decide that you want to "Go-Live" with improveit 360 without using these automated emails and activate some, or all of them, at a later date.

#	Name	Type	Folder
1	New Lead Welcome Email	Email	Templates - Prospect
2	Appointment Confirmation Email (to Prospect)	Email	Lifecycle Communications
3	Appointment Cancellation Notice (to Prospect)	Email	Lifecycle Communications
4	Staff Appointment Notification	Email	Staff Appointment Notifications
5	Staff Appointment Cancellation	Email	Staff Appointment Notifications
6	Thank You Email (post- Appointment)	Email	Templates - Appointment
7	Staff Project Activity Notification	Email	Staff Appointment Notifications
8	Staff Project Activity Cancellation	Email	Staff Appointment Notifications
9	Paid in Full Confirmation	Email	Lifecycle Communications
10	Sale Completed Confirmation	Email	Lifecycle Communications

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

i360 Lifecycle Email Communications

Relationship Legend



Note: Reference this Diagram in conjunction with the Lifecycle Email Communications Guide to see what each automated Email Template contains. Review these with your Marketing team to determine which Email Templates you'd like to use.

Email Communication #1: New Lead Welcome Email

Summary

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

Subject: Thanks, {!i360__Prospect__c.i360__Correspondence_Name__c}, for your Interest in {!Organization.Name}

Template

Dear {!i360__Prospect__c.i360__Correspondence_Name__c},

Thank you for your most recent request for information about our business and our products! We've added you to our mailing list so you can receive updates on special promotions, upcoming events, and new 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 serving you soon!

Sincerely,

{!Organization.Name}

{!Organization.Phone}

Email Communication #2: Appointment Confirmation Email

Summary

When an Appointment is schedule you can check a checkbox to send the Prospect the Appointment Confirmation Email below.

Subject: Appointment Confirmation for `{!i360__Appointment__c.i360__Start__c}`

Template

Dear `{!i360__Appointment__c.i360__Correspondence_Name__c}`,

Thank you for your interest in `{!Organization.Name}`. This email is to confirm your appointment on `{!i360__Appointment__c.i360__Start__c}` at `{!i360__Appointment__c.i360__Start_Time__c}` at the following location:

`{!i360__Appointment__c.i360__Address__c}`
`{!i360__Appointment__c.i360__City__c}`, `{!i360__Appointment__c.i360__State__c}`
`{!i360__Appointment__c.i360__Zip__c}`

Our representative(s) will be demonstrating the following products:

`{!i360__Appointment__c.i360__Components_1__c}`
`{!i360__Appointment__c.i360__Components_2__c}`
`{!i360__Appointment__c.i360__Components_3__c}`

Thank You,

`{!Organization.Name}`
`{!Organization.Street}`
`{!Organization.City}`, `{!Organization.State}` `{!Organization.PostalCode}`
Phone: `{!Organization.Phone}`
`{!User.i360__Company_Website_URL__c}`

Email Communication #3: Appointment Cancellation Notification

Summary

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

Subject: Appointment Cancellation for `{!i360__Appointment__c.i360__Start__c}`

Template

Dear `{!i360__Appointment__c.i360__Correspondence_Name__c}`,

This email is to confirm cancellation of your appointment that was scheduled to occur on `{!i360__Appointment__c.i360__Start__c}` at `{!i360__Appointment__c.i360__Start_Time__c}`.

Thank you for your interest in our products, and we hope you will think of us before your next remodeling project.

`{!Organization.Name}`

`{!Organization.Address}`

Phone: `{!Organization.Phone}`

`{!User.i360__Company_Website_URL__c}`

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: Appt on {!i360__Appointment__c.i360__Start__c} {!i360__Appointment__c.i360__Start_Time__c}
with {!i360__Appointment__c.i360__Prospect_Primary__c}

Template

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

Appointment Detail

Type: {!i360__Appointment__c.i360__Type__c}
Date: {!i360__Appointment__c.i360__Start__c}
Time: {!i360__Appointment__c.i360__Start_Time__c}
Duration: {!i360__Appointment__c.i360__Duration__c}
Interest(s): {!i360__Appointment__c.i360__Interests_Summary__c}
Rep 1: {!i360__Appointment__c.i360__Sales_Rep_1__r.Name}
Rep 2: {!i360__Appointment__c.i360__Sales_Rep_2__r.Name}

Appointment For

Name: {!i360__Appointment__c.i360__Correspondence_Name__c}
{!i360__Appointment__c.i360__Address__c}
Address: {!i360__Appointment__c.i360__City__c},
{!i360__Appointment__c.i360__State__c}
{!i360__Appointment__c.i360__Zip__c}
Phone: {!i360__Appointment__c.i360__Prospect_Phone__c}

Source Information

Source Type: {!i360__Appointment__c.i360__Source_Type__c}
Source: {!i360__Appointment__c.i360__Source__r.Name}
Taken By: {!i360__Appointment__c.i360__Leadsources_Taker__c}
Taken On: {!i360__Appointment__c.i360__Leadsources_Taken_On__c}
Component(s): {!i360__Appointment__c.i360__Leadsources_Components__c}

- improveit! 360 Appointment Team.

(VCalendar is attached)

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 `{!i360__Appointment__c.i360__Start__c}`
`{!i360__Appointment__c.i360__Start_Time__c}` with `{!i360__Appointment__c.i360__Prospect_Primary__c}`

Template

The following appointment has been CANCELED:

Appointment Detail

Status: `{!i360__Appointment__c.i360__Status__c}`
Type: `{!i360__Appointment__c.i360__Type__c}`
Date: `{!i360__Appointment__c.i360__Start__c}`
Time: `{!i360__Appointment__c.i360__Start_Time__c}`
Duration: `{!i360__Appointment__c.i360__Duration__c}`
Interest(s): `{!i360__Appointment__c.i360__Interests_Summary__c}`
Rep 1: `{!i360__Appointment__c.i360__Sales_Rep_1__c}`
Rep 2: `{!i360__Appointment__c.i360__Sales_Rep_2__c}`

Appointment For

Name: `{!i360__Appointment__c.i360__Correspondence_Name__c}`
`{!i360__Appointment__c.i360__Address__c}`
Address: `{!i360__Appointment__c.i360__City__c}`,
`{!i360__Appointment__c.i360__State__c}`
`{!i360__Appointment__c.i360__Zip__c}`
Phone: `{!i360__Appointment__c.i360__Prospect_Phone__c}`

Source Information

Source Type: `{!i360__Appointment__c.i360__Source_Type__c}`
Source: `{!i360__Appointment__c.i360__Source__c}`
Taken By: `{!i360__Appointment__c.i360__Leadsources_Taker__c}`
Taken On: `{!i360__Appointment__c.i360__Leadsources_Taken_On__c}`
Component(s): `{!i360__Appointment__c.i360__Leadsources_Components__c}`

- improveit! 360 Appointment Team.



Email Communication #6: Thank You Email

Summary

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

Subject: Thanks for your time today!

Template

Dear `{!i360__Appointment__c.i360__Correspondence_Name__c}`,

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

Since we are constantly responding to customers' expectations, to new trends, products, and changes in the industry, 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,

`{!Organization.Name}`

`{!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 {!i360__Project_Activity__c.i360__Start__c} with
{!i360__Project_Activity__c.i360__Correspondence_Name__c} - {!i360__Project_Activity__c.Name}

Template

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

{!i360__Project__c.Name}

Customer Information:

Name: {!i360__Project__c.i360__Customer_Name__c}

Address: {!i360__Project__c.i360__Appointment_Address__c}

{!i360__Project__c.i360__Appointment_City__c},

{!i360__Project__c.i360__Appointment_State__c}{!i360__Project__c.i360__Appointment_Zip__c}

Phone: {!i360__Project__c.i360__Prospect_Phone__c}

Sold On: {!i360__Project__c.Sold_On__c}

Sold Price: {!i360__Project__c.i360__Sold_Price__c}

Balance Due: {!i360__Project__c.Balance_Due__c}

Special Instructions/Directions:

{!i360__Project_Activity__c.i360__Comments__c}

Other Information:

Project State Date: {!i360__Project__c.i360__Start_Date__c}

Project Manager: {!i360__Project__c.i360__Project_Manager__c}

Installation Crew: {!i360__Project__c.i360__Installation_Crew__c}

Sales Rep: {!i360__Project__c.i360__Sale_Rep__c}

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 {!i360__Project_Activity__c.i360__Start__c} with {!i360__Project_Activity__c.i360__Correspondence_Name__c} - {!i360__Project_Activity__c.Name}

Template

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

{!i360__Project__c.Name}

Customer Information:

Name: {!i360__Project__c.i360__Customer_Name__c}

Address: {!i360__Project__c.i360__Appointment_Address__c}

{!i360__Project__c.i360__Appointment_City__c},

{!i360__Project__c.i360__Appointment_State__c}{!i360__Project__c.i360__Appointment_Zip__c}

Phone: {!i360__Project__c.i360__Prospect_Phone__c}

Sold On: {!i360__Project__c.Sold_On__c}

Sold Price: {!i360__Project__c.i360__Sold_Price__c}

Balance Due: {!i360__Project__c.Balance_Due__c}

Special Instructions/Directions:

{!i360__Project_Activity__c.i360__Comments__c}

Other Information:

Project State Date: {!i360__Project__c.i360__Start_Date__c}

Project Manager: {!i360__Project__c.i360__Project_Manager__c}

Installation Crew: {!i360__Project__c.i360__Installation_Crew__c}

Sales Rep: {!i360__Project__c.i360__Sale_Rep__c}

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.

Workflow

- Name: Sale Paid Confirmation
- Location: Sale Workflows
- Criteria: When the Sale Status is changed to Paid in Full and the Prospect has an email address and has indicated you may contact the Prospect via email.

Sale: Paid in Full On NOT EQUAL TO null) AND (Sale: Prospect Email NOT EQUAL TO null) AND (Sale: Send Email When Paid In Full EQUALS True) AND (Sale: Prospect Opt Out Email EQUALS False)

- Immediate Workflow Actions:
 - Email Alert – Send Sale Paid in Full Confirmation
 - Field Update - Sync Sale Email
 - Task – Sent Sale Paid in Full Email

Subject: Confirmation - Order Paid in Full

Template

Dear {!i360__Sale__c.i360__Correspondence_Name__c},

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

Sale ID: {!i360__Sale__c.i360__Sale_ID__c}

Sale Name: {!i360__Sale__c.Name}

Sold Price: {!i360__Sale__c.i360__Sold_Price__c}

Total Received: {!i360__Sale__c.i360__Total_Receipts__c}

Balance Due: {!i360__Sale__c.i360__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}

{!User.i360__Company_Website_URL__c}

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.

Workflow

- Name: Sale Final Confirmation
- Location: Sale Workflows
- Criteria: When the Sale Status is changed to Final and the Prospect has an email address and has indicated you may contact the Prospect via email.

(Sale: Final On NOT EQUAL TO null) AND (Sale: Send Email When Final EQUALS True) AND (Sale: Prospect Email NOT EQUAL TO null) AND (Sale: Prospect Opt Out Email EQUALS False)

- Immediate Workflow Actions:
 - Email Alert – Send Sale Completed Confirmation
 - Field Update - Sync Sale Email
 - Task – Sent Sale Completed Email

Subject: Thank You for Your Business!

Template

Dear `{!i360__Sale__c.i360__Correspondence_Name__c}`,

As one of our valued customers, we hope you have been happy with the work completed by `{!Organization.Name}`. Our customers are central to the success of our business, and it has been our pleasure to serve you.

If you are satisfied with the work that has been completed by `{!Organization.Name}`, we ask that you recommend us to your friends, family, and neighbors. Our customers are our best salespeople, and you can have the opportunity to earn valuable rewards for your referrals that can be applied toward future purchases. For more information on our referral program, please contact us at the phone number listed below.

We greatly value your business and look forward to serving you in the future!

Thank You,

`{!Organization.Name}`
`{!Organization.Address}`
`{!Organization.Phone}`
`{!User.i360__Company_Website_URL__c}`