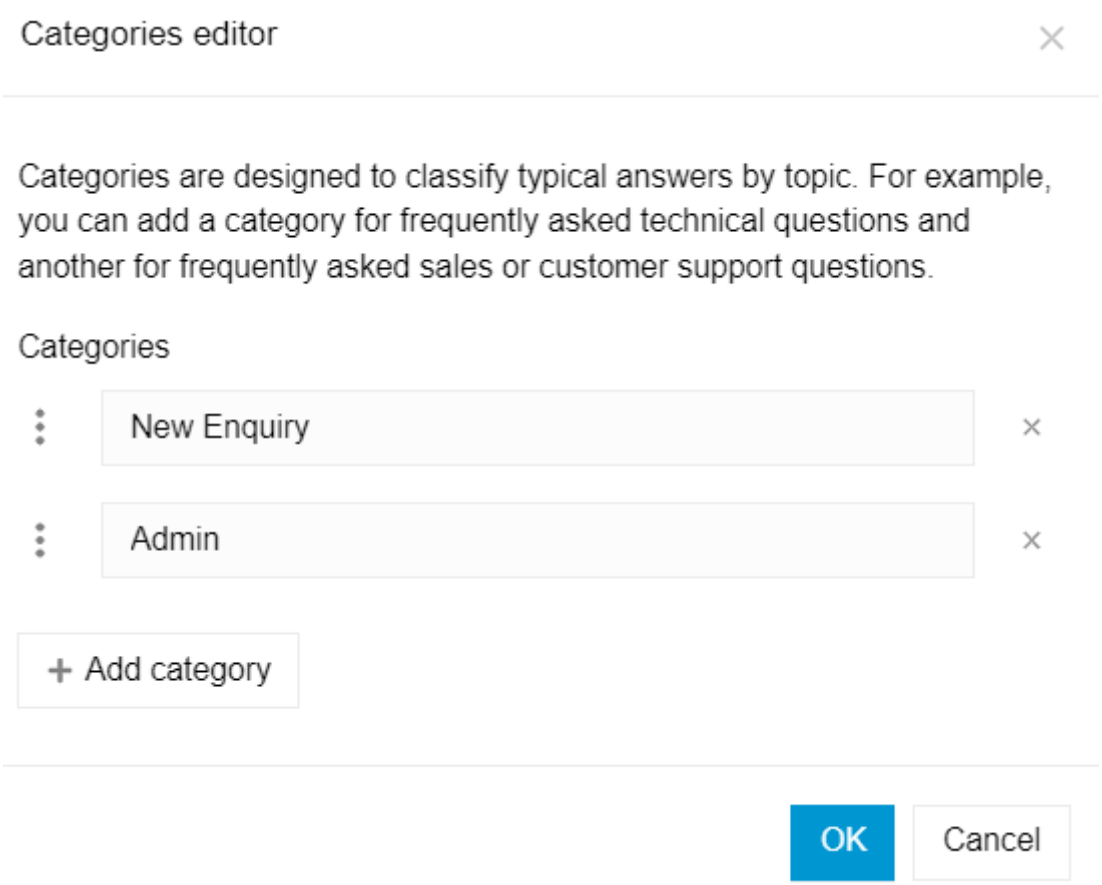
Quick Response Templates for SMS & Chat

New template icon in the chat bar



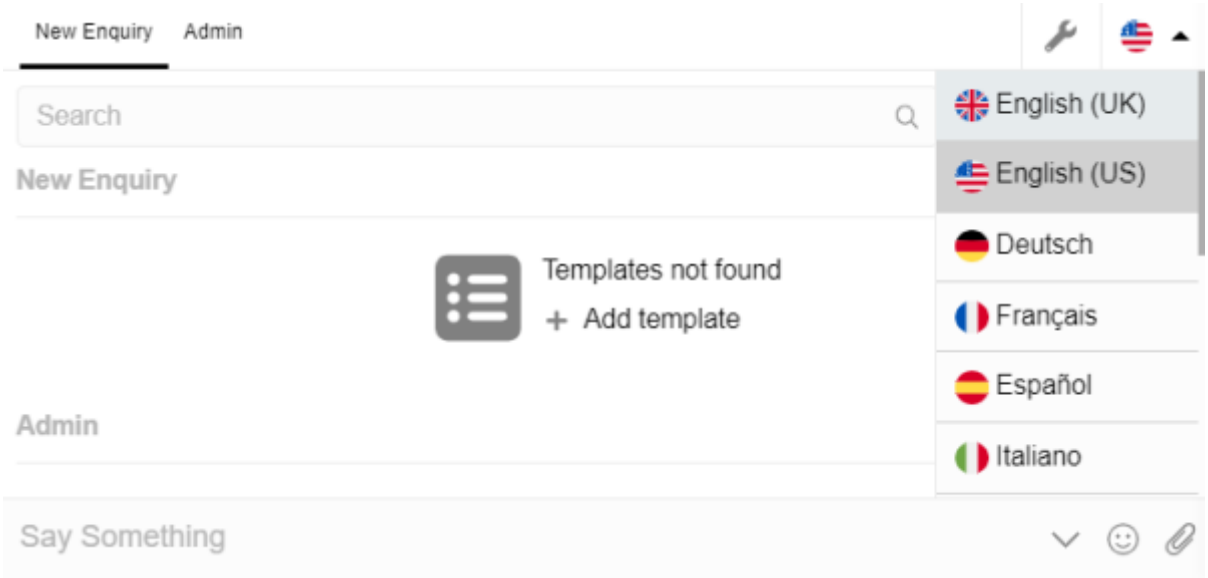
Once a template has been created, simply click on any chat message and then click on the 'Template' icon in the response bar. Now you will be able to click the ‘+ Add category’ button to start setting up your templates and organizational structure.

Keep them organized and easy to find



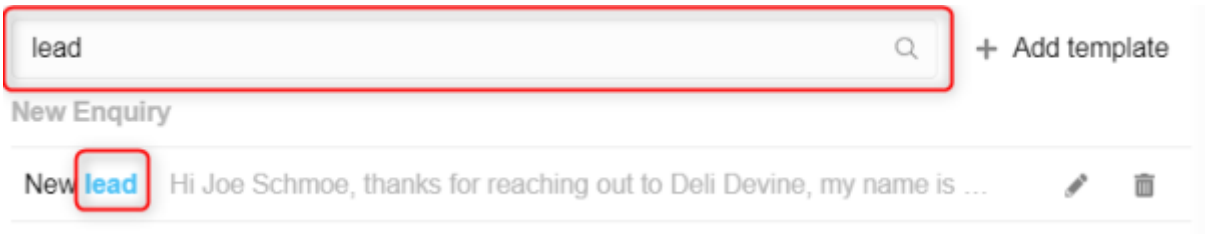
Imagine you have a customer support team of 100 different agents all working in different departments or teams (e.g sales and support). Their quick response template requirements will all be different. That is why we created template categories. By designating each template into a separate category, agents will be able to view their team's responses easily.

16 different language categories



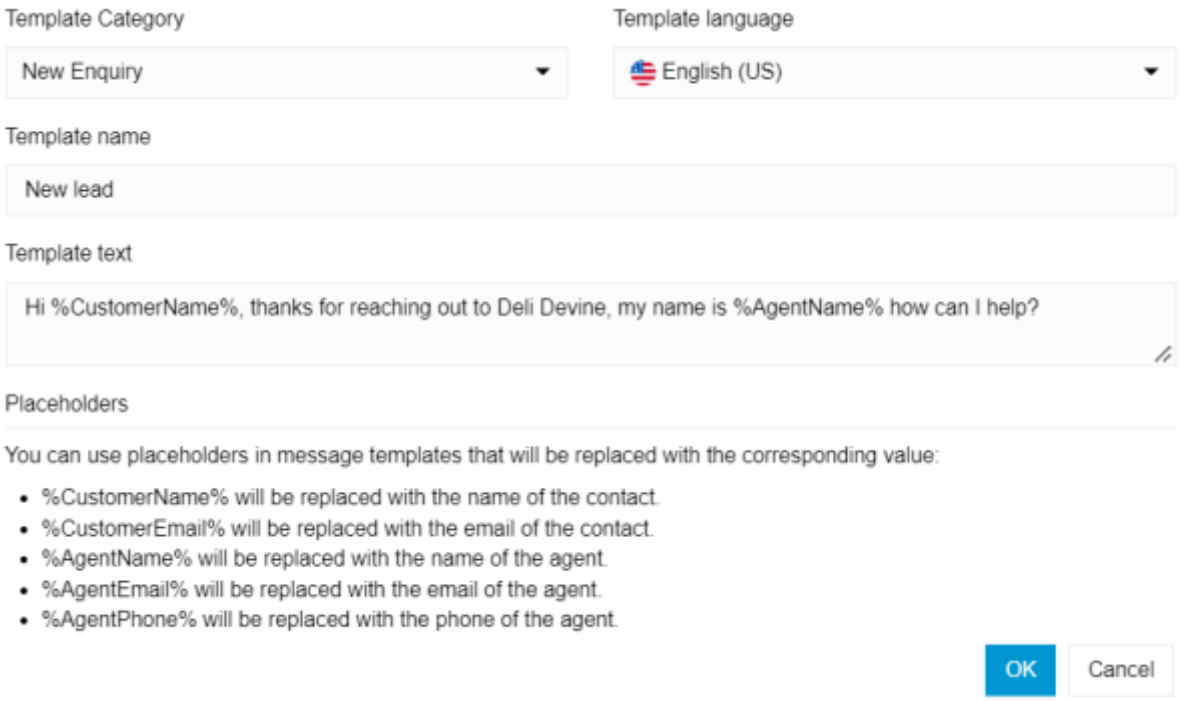
Now imagine those 100 team members servicing customer queries across all time zones and in different languages. Quick reply messages can not only be split up into categories but also created in 16 different language categories. This is a key component as responses in different lands will have a different tone or manner when responding.

Quick lookup search box



Sorting templates into categories and languages is a great way to keep all of your responses organized. However, as each template is able to be given a template name, agents can use the search box to find the desired message quicker. The search box doesn't just search template titles but also the message text. This means that an agent can obtain the relevant information like the customer name, or other contact information quicker in order to resolve the query.

Placeholders give it a personal touch



The idea behind creating quick response templates is to service customer requests quicker. But with speed, the client/visitor could get the feeling they are just being fed canned responses by some chatbot. Personalized placeholders will help with this. By setting up your templates to include these placeholders, you are able to quickly and easily make the customer feel valued and put that personal touch back into the conversation. Available placeholders are:

- %CustomerName% will be replaced with the name of the contact.
- %CustomerEmail% will be replaced with the email of the contact.
- %AgentName% will be replaced with the name of the agent.
- %AgentEmail% will be replaced with the email of the agent.
- %AgentPhone% will be replaced with the phone of the agent.

So for example, Joe Schmoe has sent a WhatsApp text message to a company. The first agent to respond clicks the 'Take' button and then selects the 'New lead' welcome message template which has been set up as:

> *Hi %CustomerName%, thanks for reaching out to Deli Devine, my name is %AgentName%, how can I help?*

Joe would then get the following message.

> *Hi Joe Schmoe, thanks for reaching out to Deli Devine, my name is Brandon Moran, how can I help?*

Click, edit & send

An agent, however, does not have to use all the content of a templated response. Once a response has been clicked on, the message is not immediately sent. The response bar is populated with the message which then allows an agent to amend the response if needed.

Revision #3
Created 2026-05-19 20:26:21 UTC by Nathan Kratz
Updated 2026-05-19 20:44:17 UTC by Nathan Kratz