



TRIPS

# Email templates

Save the emails you send over and over — welcome, quote-ready, booking confirmation, payment reminder, post-trip thank-you — and load them into the composer with one click.

Covers the platform defaults Trips ships with, merge tags, and editing or deleting them.

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Email templates are reusable subject + body pairs you load into the Trip Messages composer when you start a new thread. Trips ships six platform defaults — welcome, quote ready, booking confirmation, final itinerary, payment reminder, post-trip thank-you — that you can use as-is, edit to match your voice, or replace entirely.

#### ADVISOR TIP

**Templates are tenant-wide, not per-agent.** Every member of your agency sees the same library. Brand voice, signature blocks, and tone stay consistent without each agent reinventing them.

## Where they live

Open **Settings** → **Email templates**. The page lists every template in your agency, with platform defaults pinned at the top of the list. Each row shows the template name, a short description, and Edit / Delete buttons on the right.

Inside the Trip Messages composer, the template picker fetches the same list — newest active templates appear in a dropdown when you click **Load template**. Picking one fills in the subject and HTML body; you can tweak before sending.

## Platform defaults

Every new agency starts with six templates covering the moments most agents email about. You can edit them, rename them, or delete them — the seeder doesn't recreate ones you removed.

- **Welcome / Initial outreach.** First email after a new inquiry comes in.
- **Quote is ready.** Sent with a proposal share link.
- **Booking confirmation.** Goes out once the trip is locked.

- **Final itinerary.** Pre-departure handoff with the day-by-day details.
- **Payment reminder.** Polite nudge before a deposit or final is due.
- **Post-trip thank you.** Welcome-home email asking for a review.

#### ADVISOR TIP

**Edit, don't replace.** The platform defaults are a starting point — change the tone, swap a paragraph, add your signature. You don't need to delete and recreate them.

## Create or edit

1. On **Settings** → **Email templates**, click **+ New template** (or **Edit** on an existing row).
2. Give it a **Name** (visible only to your team in the picker) and an optional **Description** (one-liner that shows in the picker tooltip).
3. Write the **Subject** — supports merge tags.
4. Compose the **HTML body** in the editor — headings, lists, bold/italic, links, images. The variable panel on the side lists every merge tag you can drop in.
5. Save. The template appears in the picker for every agent on your team immediately.

## Merge tags

Templates support a fixed allowlist of merge tags wrapped in `{{ }}` braces. At send time we substitute them with values from the trip and the recipient.

### Contact

- `{{ first_name }}`
- `{{ last_name }}`
- `{{ full_name }}`
- `{{ email }}`

### Trip

- `{{ trip_name }}`
- `{{ trip_start_date }}`
- `{{ trip_end_date }}`
- `{{ trip_duration_nights }}`
- `{{ trip_destinations }}`

### Agency / agent

- `{{ agency_name }}`
- `{{ agency_signature }}`
- `{{ agent_name }}`
- `{{ agent_email }}`

#### ADVISOR TIP

**Unknown tags are removed.** If you type `{{ booking_ref }}` (not in the allowlist) it gets stripped from the rendered email — not left in place looking broken to the client, but you won't see what you expected either. Stick to the tags above.

## Deleting a template

Click **Delete** on a row. The template is soft-deleted — it stops appearing in the composer immediately and disappears from the settings list. The normal first-login seeder won't bring it back; support can re-run the seeder explicitly to restore platform defaults if you ask.

If you delete a default and change your mind, recreate it by hand with **+ New template** — we don't have a "restore platform defaults" button (yet).

## Troubleshooting

### I edited a platform default and now the rest of the team is seeing my changes.

That's expected — templates are tenant-wide. If you wanted a personal variant, duplicate it under a new name first.

### A merge tag is showing up literally in the sent email.

Either the tag name has a typo (`{{ first-name }}` instead of `{{ first_name }}`), or it's not in the allowlist. Compare against the tag list above.

### The composer's template picker is empty.

Open **Settings** → **Email templates** and confirm at least one template has **Active** on. Templates that have been soft-deleted, or marked inactive, don't appear in the picker.

## Related

- [Trip Messages — sending, replying, threading](#)
- [Send emails from your own Gmail](#)
- [The Trip page, top to bottom](#)
- [Trips — Getting Started](#)

