Message Template Library

The Message Template Library lets you draft messages instantly. Find, copy, and customize a wide variety of professional, ready-made templates for every step of your workflow, including client updates, helpful reminders, and more.

Introduction

Pipeline's Message Template Library makes it easy to expand your collection of templates and draft messages instantly.

Instead of creating every message from scratch, you can browse and copy from a wide variety of professional, pre-built templates designed for common tasks.

Once copied, you can easily customize them for your needs, control which ones are visible to agents, and share them with your team. No setup is required to begin browsing.

View Library

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:
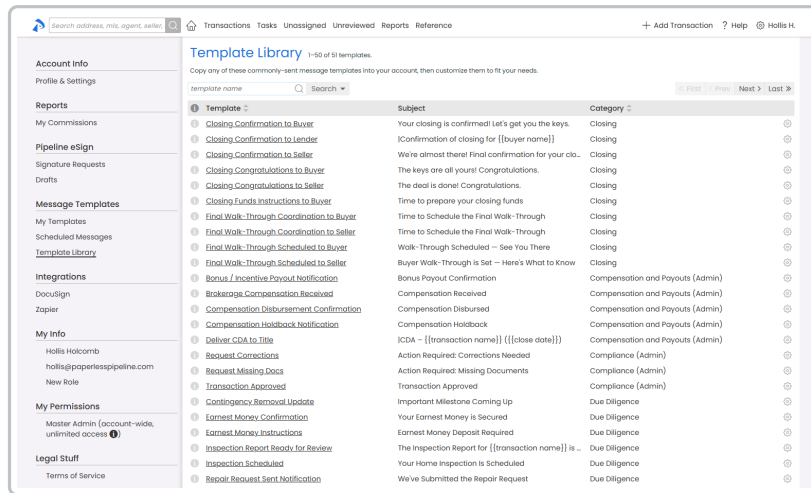
Go to My Info

- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.

View a Template

Preview the full text and content of any pre-built template before deciding to copy it to your office's library.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

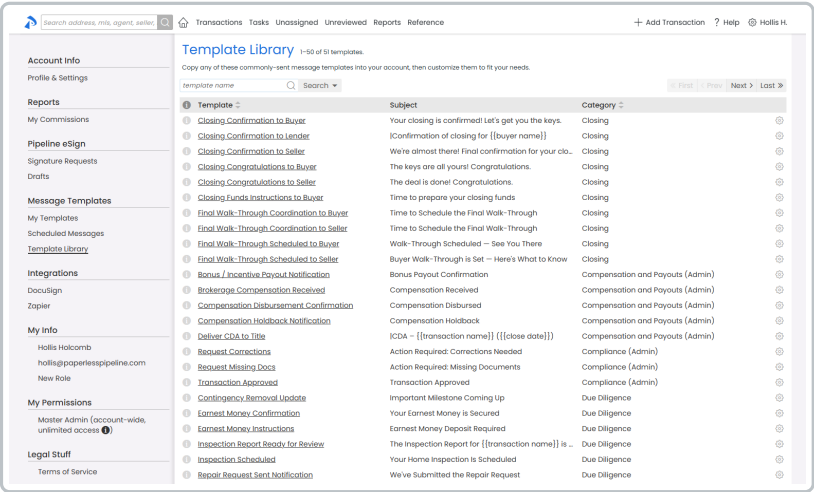To view a pre-built template:

Choose a Template to View

- Browse the Message Template Library to find the template you want to preview.
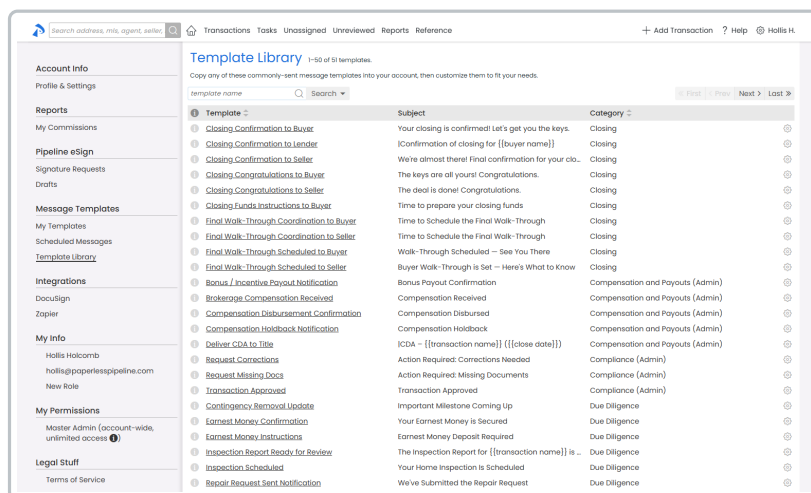
View the Template

- Click on the template's name. A preview window will appear showing the full

message body.

Copy a Template

When you find a pre-built template you like, copy it to your office's library. Once copied, it becomes a normal template that you can customize for your needs and share with your team.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To copy a pre-built template:

Choose the Template to Copy

- Browse the Message Template Library to find the template you want to copy.
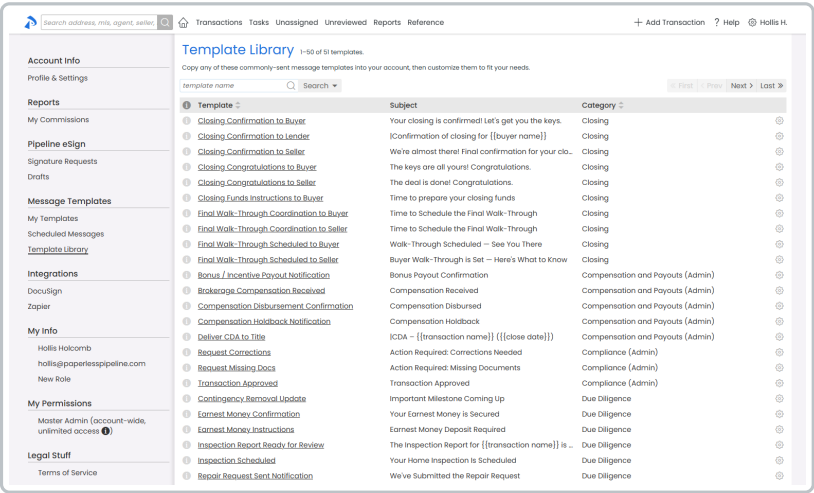
Copy to Your Library

- Click the gear icon next to the template, then [Copy to My Templates]. It will now appear in your private templates list.