Message Template Library

Explore the Message Template Library to access a wide range of prebuilt message templates for client communication, agent updates, task reminders, and more.

Who Can Do This: Anyone can view the Message Template Library. Some templates are only visible to admins.

To view the Message Template Library:

Go to My Info

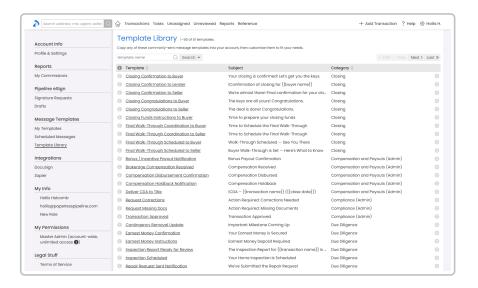
• Click your name in the upper right corner, then [My Info].

Open the Template Library

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

Browse Templates

• Explore the full collection of ready-to-use message templates.



View a Template

Preview the full content of any prebuilt message template before deciding to copy it into your collection of reusable message templates.

Who Can Do This: Anyone can view the Message Template Library. Some templates are only visible to admins.

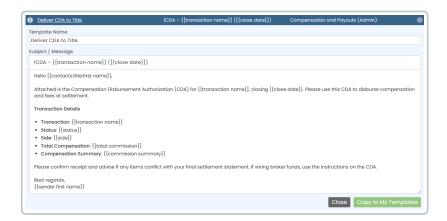
To view a prebuilt message template:

Choose a Template to View

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

View the Template

• Click the template name. A preview window will display the complete message.



Copy a Template

When you find a prebuilt template you like, copy it to your collection. Once copied, you can customize and use it like any other message template.

Who Can Do This: Anyone can copy templates from the Message Template Library. Some templates are only visible to admins.

To copy a prebuilt message 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]. The template will be added to your personal collection of reusable message templates.

