

Shared Message Templates

SUMMARY

Note and email templates are shareable between admins. After creating a note/email, click the "Share with other admins" checkbox. It will appear in the Saved message templates dropdown list of other admins' shared templates.

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Save an Email Template

To save an email template:

- 1 Go to the transaction and click [Note / Email] just above the list of documents.
- 2 Enter your subject and message.
- 3 Name your template.
- 4 Click the [Add Note]. This will save the template.

The screenshot shows a web interface for managing documents and notes. At the top, there are buttons for 'Note / Email', 'Add Contact', 'Send to DocuSign', 'Merge Docs', and 'Upload Docs'. Below these, a dropdown menu is open for 'Note / Email', showing options like 'Send an email or add a note'. The main area displays two lists of documents: 'Listing Docs' and 'Sale Docs'. Each document has a date, a 'Reviewed' checkbox, and an 'Entered' checkbox. Below the document lists, there is a section titled 'Notes & Sent Emails' with a '+ Add Note' button. The note content area shows a template for a transaction with a 'Residential' label, including fields for the label, a list of documents sent, and the sender's information (Michael Angeletti).

Document	Date	Reviewed	Entered
Full Listing Agreement	Mar 7, 16	☒	☒
Keybox authorization by	Apr 12, 16	☒	☒
Keybox-Authorization-By-Tenant	Mar 7, 16	☒	☒
Lead Based Paint Addendum	Mar 7, 16	☒	☒
Named Exclusions Addendum To Listing	Mar 7, 16	☒	☒
named exclusions addendum to listing signed	Mar 7, 16	☒	☒
Notice to Prospective Buyer	Mar 7, 16	☒	☒
Sellers Property Disclosure	Mar 7, 16	☒	☒
example.pdf	Sep 30, 16	☐	☐
Home Inspection	Aug 26, 16	☐	☒
Purchase Contract	Aug 26, 16	☐	☒

Notes & Sent Emails [+ Add Note](#)

This Tx has "Residential" Label
This has a label.
The following docs were sent:
7042_Highland_Park-coversheet.pdf

Michael Angeletti
Sep 27, 16
Emailed to: michael@angelettigroup.com,
rajesh@paperlesspipeline.com

Share an Email Template

To share a saved email template:

- 1 **Go to My Info**
 - Click your name in the upper right corner, then [My Info].
- 2 **Click [Email Templates] from the left menu.**
- 3 **Click the template you'd like to share then click [Share with other admin].**
- 4 **Click [Save Template].**The template will now appear under the Saved Templates dropdown list of other admins when they're sending a note/email.

☒ Share With Other Admins Cancel Save Template

Use a Shared Email Template

To use a shared email template:

- 1 **Go to the transaction and click [Email / Notes] just above the list of documents.**
- 2 **Select a saved template from the 'Choose a saved message template' dropdown list.**You will see your own saved templates as well as those shared by other admins.
- 3 **Click [Add Note] to send the message.**

When selecting from the list of saved templates, type a few letters of the name of the template to narrow your selection.