

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:

1 Go to My Info

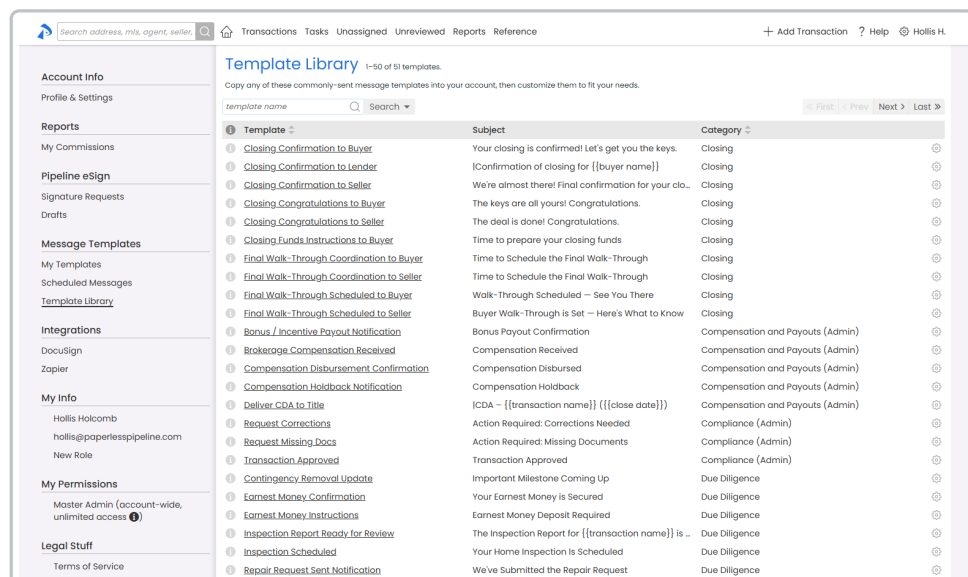
- Click your name in the upper right corner, then [My Info].

2 Open the Template Library

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

3 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:

1 Choose a Template to View

- [Browse the Message Template Library](#) to find the template you want to preview.

2 View the Template

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

Deliver CDA to Title | CDA - {{transaction name}} ({{close date}}) | Compensation and Payouts (Admin)

Template Name
Deliver CDA to Title

Subject / Message
CDA - {{transaction name}} ({{close date}})

Hello {{contacts.titlefirst name}},

Attached is the Compensation Disbursement Authorization (CDA) for {{transaction name}}, closing {{close date}}. Please use this CDA to disburse compensation and fees at settlement.

Transaction Details

- Transaction: {{transaction name}}
- Status: {{status}}
- Side: {{side}}
- Total Compensation: {{total commission}}
- Compensation Summary: {{commission summary}}

Please confirm receipt and advise if any items conflict with your final settlement statement. If wiring broker funds, use the instructions on the CDA.

Best regards,
{{sender first name}}

[Close](#) [Copy to My Templates](#)

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:

1 Choose the Template to Copy

- [Browse the Message Template Library](#) to find the template you want to copy.

2 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.

