

Message Templates Are Missing, Blank, or Out of Date

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An empty template list, a template that won't open, or a stale version showing up on a transaction — each one has a different cause, and none of them mean your work is gone.

My Templates Page Is Empty

The *My Templates* page shows only the templates **you** created. Templates other people shared with you never appear there — sharing lets you use a template when you compose a message, not manage it. So a master admin who has never built a template of their own sees an empty list, and that's expected.

To find a template someone shared with you, open a transaction, start a note or email, and look in the saved message template list. Shared templates sit alongside your own.

Our Office's Templates Disappeared

Templates belong to the person who created them, so when that profile is deactivated the templates go out of reach with it. This is the most common cause of a whole set vanishing at once.

To get them back:

1. Check whether the person who built them has been deactivated.
2. Email help@paperlesspipeline.com from a master admin's login email and ask us to transfer their templates to an active user.
3. Tell us the login email address they're coming from, the login email address they're going to, and which templates to move.

Transferred templates keep their share settings, and the new owner can edit and share them from then on.

If nobody was deactivated, the other possibility is that the owner changed a template's share setting or deleted it. Ask them to check their *My Templates* page.

A Template Opens Blank or Won't Load

A template that opens to a white box, or a message body that won't load when you go to edit it, is almost always the browser rather than your account. Work through these in order:

1. Do a hard refresh of the page — **Windows:** Ctrl + Shift + R • **MacOS:** Command + Shift + R.
2. Open Pipeline in a private or incognito window, which runs without your extensions.
3. Try a different browser.

If one of those works, an extension or a cached file was the culprit. If none of them do, send us the template name and we'll take a look.

An Old Version of a Template Appears on a Transaction

You edited a template, but the transaction still fills in the previous wording. Your browser is serving a saved copy. A hard refresh forces it to pull the current version — **Windows:** Ctrl + Shift + R • **MacOS:** Command + Shift + R. If the old version survives a hard refresh, contact us.

Asterisks or Odd Characters Show Up in the Message

Asterisks appearing as literal `**` around your text mean the template holds markdown. Pipeline used markdown for formatting before the visual formatting toolbar arrived, so template text copied from older examples still carries those symbols.

To clean up an affected template, don't delete it — edit it. Open the template, clear the **Email Body**, retype or paste the wording as plain text, apply bold and italic with the formatting options instead of asterisks, and save.

A garbled apostrophe has a narrower cause: it shows up when a line in the template starts with more than three leading spaces. Remove the extra indentation from that line and it renders normally.

Still Stuck?

If a template is still missing or misbehaving after the steps above, email help@paperlesspipeline.com with the template's name and the transaction you were sending from, and mention what you already tried.

Learn More

Save a message you send often, then reuse it in a couple of clicks the next time a transaction needs it.

See [My Templates](#)
