

My Templates FAQ

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Message templates belong to the person who created them, live under *My Info*, and can be shared but not co-owned. Answers to the common questions about editing someone else's template, what happens when a profile is deactivated, and getting a copy out of Pipeline.

Can another admin edit or delete my message templates?

No — only the person who created a template can change or remove it. That holds for master admins too. Someone you've shared a template with can use it when they send, but the copy they're using is still yours.

Can I copy a template into someone else's profile?

Not directly, but there are two good paths. Share the template and they can send from it as-is. Or paste the subject and body to them so they can build their own version under their login and edit it however they like.

What happens to my templates if my profile is deactivated?

They go out of reach along with the profile. Move them before the profile is deactivated, or email help@paperlesspipeline.com afterward and we'll transfer them to an active user. If office-wide templates matter to you, a good habit is keeping them under one long-lived admin login so they never ride out with a departure.

Can I download or export my message templates?

There's no export today. To get a copy outside Pipeline, open each template and paste its subject and body into a document, or send yourself a message built from it and keep the email.

Can I attach a file or add an image to a template?

Not today — a template holds a subject line and a message body. Attachments get picked when you send, and links work fine inside the body: type a URL and it becomes clickable in the received email.

Can I preview a template from My Info?

Preview lives on a transaction, not on the *My Templates* page. That's because a preview renders your autofill tags against real transaction data, which only a transaction can supply. Build or test on a sample transaction, then save the finished wording as your template.

Does everyone in my office see my templates automatically?

No, templates are private until you share them. Sharing is set per template, and it takes admin-level access. See [Shared Templates](#).

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](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
