Share Message Templates and Keep Them When Someone Leaves

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A template written by one admin can serve the whole office — and it doesn't have to leave with them. Share it, and know how to move it before the person who owns it is gone.

Introduction

Message templates are personal property in Pipeline. Each one belongs to the profile of the person who wrote it, which is why your best admin's carefully worded closing email isn't sitting in some account-wide library waiting for the rest of the team to find it.

Sharing exists, and it's a couple of clicks. That's workable as long as you know two things. First, what sharing actually gives the other person, which is less than most people assume. Second, what happens on the day the owner's profile goes away. The second one is the expensive one, and it's much cheaper to handle before it happens than after.

When to Use This

- Every admin is writing their own version of the same email and they're all slightly different.
- A staff member has resigned and their templates are the ones the office actually uses.
- Someone's login email is changing and you don't want their templates stranded on the old profile.
- An agent has been sent a template to use and says they can't edit it.
- Two offices are becoming one account and everyone's templates need to come across.

1. Write It Under a Login That Isn't Going Anywhere

Since templates live on a profile rather than in the account, who writes the office's shared templates is a decision, not a detail. A long-serving admin or a role-based login is a safer home than whoever happened to need the email first.

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

See My Templates

> There's no category or folder system for templates. If you're going to build a set, put the type at the front of the name — "Listing — Intro", "Sale — Intro" — and the type-ahead in the template picker will group them for you when you start typing the prefix.

2. Share It With the Office or Just the Admins

Open the template and set its sharing: with everyone, or with other admins only. Sharing with everyone is what puts a message in your agents' hands; admins-only keeps a template that's really an internal tool out of the agents' picker.

One admin can write a message once and hand it to the whole office. That's what sharing a message template does.

See Shared Templates

> Sharing is an admin ability, and specifically an admin with **View all transactions**. An agent or a non-admin staff member can write templates all day but has no way to hand one to anyone else.

3. Decide Between Sharing It and Handing Over a Copy

Sharing is not the same as giving. A shared template stays yours: recipients can apply it and send it, but they can't change a word, and you keep the right to edit it or stop sharing it whenever you like. For a message that should read the same coming from everybody, that's exactly right.

When the other person needs their own version — their own signature, their own turns of phrase, their own edits over time — sharing will only frustrate them. Copy the body of the template and send it to them so they can build their own under their own login. There's no copy function that does this for you, and no export, so it really is a copy and paste.

> Master admins can't edit other people's templates either, and that's deliberate rather than an oversight — it keeps everyone's template list their own. If a shared template needs a change, the owner makes it.

4. Move Ownership Before the Owner Leaves

Deactivating a user doesn't destroy their templates — the account keeps them, still attached to that profile. What you lose is anyone who can edit or re-share them, because that right belongs to the profile you just switched off.

Our Tech Team moves templates between profiles on request. Send us three things: the login email they're coming from, the login email they're going to, and which templates to move — name them, or say all of them. Share settings come across with them, so anything that was shared with the office stays shared. Afterwards the new owner can edit, re-share, and schedule them like their own.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

> The same request handles a changing email address. If someone's login is moving to a new address, ask for the templates to move with it rather than rebuilding them on the new profile.

5. Name Your Templates When Accounts or Offices Move

Merging accounts or moving an office to a different account is a Tech Team job, and templates can travel with it — but only what's on the list gets moved. Templates are easy to forget on a form that's asking about locations, users, and transactions.

So put them on the request explicitly: whose templates, and which ones. It costs you a line in an email and saves an office from rebuilding a year of messages by hand.

Two brokerages, two Pipeline accounts, one company now. An Account Merge brings every Location across and leaves you running on one.

See Account Merge