

Shared Templates FAQ

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Sharing a message template lets other people send from it without handing over control of it. Answers to the common questions about who can share, why a shared template isn't on your templates page, and what happens when the owner leaves.

Who can share a message template?

Master admins, and admins with the **View All Transactions** permission. Anyone can build templates; the share setting only appears for people with that admin-level access. If a coordinator needs to share theirs, either grant them the permission or ask us to move the templates to an admin's profile.

Why don't shared templates show on my My Templates page?

That page lists only the templates you created. A template shared with you shows up where you'd use it — in the saved message template list when you compose a note or email on a transaction.

Can I edit a template someone shared with me?

No — only the creator can change it. Ask them to make the edit, or paste the wording into a new template of your own and adjust that one however you like.

A teammate says they can't see my template. Why?

Sharing is set per template, and it's off until you turn it on. Open the template, set **Share Template** to the audience you want, and save. Existing in the account isn't the same as being shared.

What happens to shared templates when the owner is deactivated?

They go out of reach for everyone, because they still belong to that profile. Email help@paperlesspipeline.com and we'll transfer them to an active admin. Share settings carry across, so the office keeps using them.

Can two admins co-own the same template?

No, a template has one owner. The practical version of co-ownership is keeping office-wide templates under a single long-lived admin login and sharing them with everyone.

Learn More

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](#)

Still Have Questions?

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