

Shared Templates

Last Modified on 09/04/2026 11:12 am EDT

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

Introduction

Message templates start out private. Sharing is the switch that opens one up to the rest of your account, so the reminder email your best admin wrote becomes the reminder email everyone sends.

You choose the audience per template: other admins only, or everyone in the account. Nothing about the template changes when you share it. It stays in your profile, under your name, and yours to edit — the people you share with can pick it up and send from it, and that's all.

That one-owner design is deliberate. It keeps a shared template from being quietly rewritten under you, and it keeps everyone else's template list from filling up with other people's work.

How It Works

Sharing is set on each template, takes admin-level access, and grants use rather than ownership.

Two Audiences

A template's **Share Template** setting offers [Share With Other Admins] or [Share With Everyone]. Pick the one that matches who should be sending the message.

Sharing Grants Use, Not Control

People you share with can apply the template when they send from a transaction. They can't see it on their own *My Templates* page, and they can't edit, schedule, or delete it. Only you can.

Where a Shared Template Shows Up

On a transaction, when you're composing a note or email, shared templates appear in the same saved message template list as your own — usually below them. That list is the only place they surface.

Sharing Is Per Template

Turning sharing on for one template doesn't touch the rest. A template that lives in your account isn't shared until you set it that way, which is the usual reason a colleague says they can't find one.

If the Owner Leaves

A shared template still belongs to its creator, so a deactivated profile takes it out of reach for everyone. Ask us to transfer the templates to an active admin first. See [My Templates](#).

Share a Message Template

Open a template you created and choose who in your account can send from it.

Who Can Do This: Master admins, and admins with the **View All Transactions** permission.

To share a message template:

1. Click [Gear] in the upper-right corner, then [My Info].
2. Click [My Templates] under **Message Templates** in the left menu.
3. Click the template you'd like to share.
4. From the **Share Template** menu at the bottom of the template, select [Share With Other Admins] or [Share With Everyone].
5. Click [Save Template].

The template now appears in the saved message template list for the people you shared it with, next time they compose a note or email on a transaction.

Change a Template's Share Setting

Widen a template's audience, narrow it, or take it back to private.

Who Can Do This: The person who created the template.

To change a template's share setting:

1. Click [Gear] in the upper-right corner, then [My Info].
2. Click [My Templates] under **Message Templates** in the left menu.
3. Click the template you'd like to change.
4. From the **Share Template** menu at the bottom of the template, select the setting you want.
5. Click [Save Template].

The change takes effect right away. If you narrow the audience, the template drops out of the saved template list for anyone who no longer has it.

Use a Shared Message Template

Pick a template a colleague shared with you when you're sending from a transaction.

Who Can Do This: Anyone a template has been shared with.

To use a shared message template:

1. Open the transaction and start a note or email.
2. Choose the template from the saved message template list. Shared templates sit alongside your own — type a few letters of the name to narrow a long list.
3. Adjust the wording for this transaction if you need to.
4. Send the message.

The subject and body fill in from the template, and any autofill tags in it pull from the transaction you're on. Editing here changes this one message, not the template.

Shared Templates FAQ

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. See [Shared Templates FAQ](#).
