Template Library

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The Message Template Library is a shelf of ready-made messages for every stage of a deal. Browse it, copy what fits, and make it your own.

Introduction

Starting a template from an empty box is the slowest part of setting up your messaging. The Message Template Library removes it. It's a collection of prebuilt messages, written for the moments a deal actually has — client communication, agent updates, task reminders, and more.

Browse the library, preview anything that looks close, and copy the ones you want. A copied template lands in your own collection, where it behaves like every other template you've written: edit the wording to sound like you, schedule it, and if you're an admin, share it with your team.

The library is a starting point, not a live feed. Nothing you copy stays tied to the original, so you're free to rewrite it entirely.

How It Works

Everything in the library is read-only until you copy it into your own collection.

Where the Library Lives

Click [Gear] in the upper-right corner, then [My Info]. Under **Message Templates** in the left menu, click [Template Library].

Preview Before You Commit

Clicking a template's name opens a preview of the complete message, so you can read the whole thing before deciding whether it's worth copying.

Copying Is What Makes It Yours

You can't apply a library template straight from the transaction email screen. Copy it first, and it joins your own templates — from there it's available everywhere you'd use one.

Some Templates Are Admin-Only

Anyone can open the library, but a few templates are visible only to admins, so two people may see slightly different shelves.

Once Copied, It's an Ordinary Template

A copied template is yours: edit it, schedule it, delete it, or share it exactly like one you wrote from scratch. See My Templates.

View the Message Template Library

Open the library to browse the full collection of ready-to-use message templates.

Who Can Do This: Anyone added to a Paperless Pipeline account. Some templates are visible only to admins.

To view the Message Template Library:

1. Click [Gear] in the upper-right corner, then [My Info].

2. Click [Template Library] under **Message Templates** in the left menu.

The full collection opens, grouped by the kind of message each template handles.

View a Template in the Library

Read a prebuilt template in full before you decide to copy it.

Who Can Do This: Anyone added to a Paperless Pipeline account. Some templates are visible only to admins.

To view a template in the library:

1. Browse the Message Template Library to find the template you want to read.

2. Click the template name.

A preview window opens with the complete message, subject and body.

Copy a Template to My Templates

Add a prebuilt template to your own collection so you can use, edit, and share it.

> **Who Can Do This**: Anyone added to a Paperless Pipeline account. Some templates are visible only to admins.

To copy a template to your own collection:

1. Browse the Message Template Library to find the template you want.

2. Click the gear icon next to the template, then click [Copy to My Templates].

The template is added to *My Templates*. Open it there to change the wording, and it's ready to pick the next time you send from a transaction.

Template Library FAQ

The library holds prebuilt messages you copy into your own collection before using them. Answers to the common questions about what's in it, whether copies stay linked, and who can see which templates. See Template Library FAQ.