

Shared Message Templates

SUMMARY

Note and email templates are shareable between admins. After creating a note/email, click the "Share with other admins" checkbox. It will appear in the Saved message templates dropdown list of other admins' shared templates.

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Save an Email Template

To save an email template:

- 1 Go to the transaction and click [Note / Email] just above the list of documents.
- 2 Enter your subject and message.
- 3 Name your template.
- 4 Click the [Add Note]. This will save the template.

The screenshot displays a software interface with a top navigation bar containing buttons for 'Note / Email', 'Add Contact', 'Send to DocuSign', 'Merge Docs', and 'Upload Docs'. Below this is a table of documents categorized into 'Listing Docs' and 'Sale Docs'. The 'Listing Docs' section includes items like 'Full Listing Agreement', 'Keybox authorization by', and 'Lead Based Paint Addendum'. The 'Sale Docs' section includes 'example.pdf', 'Home Inspection', and 'Purchase Contract'. Each document row shows a date, a 'Reviewed' status (checkbox), and an 'Entered' status (checkbox). Below the table is a section titled 'Notes & Sent Emails' with a '+ Add Note' button. The content of this section shows a transaction with a 'Residential' label, a list of documents, and a metadata block for Michael Angeletti.

	Added On	Reviewed	Entered	
Listing Docs - visible to listing agents and office staff				
Full Listing Agreement	Mar 7, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Keybox authorization by	Apr 12, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Keybox-Authorization-By-Tenant	Mar 7, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Lead Based Paint Addendum	Mar 7, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Named Exclusions Addendum To Listing	Mar 7, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
named exclusions addendum to listing signed	Mar 7, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Notice to Prospective Buyer	Mar 7, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Sellers Property Disclosure	Mar 7, 16	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Sale Docs - visible to listing, selling agents, and office staff				
example.pdf	Sep 30, 16	<input type="checkbox"/>	<input type="checkbox"/>	⚙️
Home Inspection	Aug 26, 16	<input type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️
Purchase Contract	Aug 26, 16	<input type="checkbox"/>	<input checked="" type="checkbox"/>	⚙️

Notes & Sent Emails + Add Note

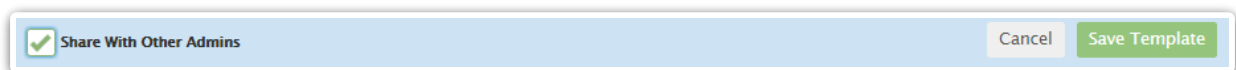
This Tx has "Residential" Label
This has a label.
.....
The following docs were sent:
7042_Highland_Park--coversheet.pdf

Michael Angeletti
Sep 27, 16
Emailed to: michael@angelettigroup.com,
rajesh@paperlesspipeline.com

Share an Email Template

To share a saved email template:

- 1 Go to your **Personal Profile** by clicking your name in the upper right corner, then [Personal Profile].
- 2 Click [Email Templates] from the left menu.
- 3 Click the template you'd like to share then click [Share with other admin].
- 4 Click [Save Template]. The template will now appear under the Saved Templates dropdown list of other admins when they're sending a note/email.



Use a Shared Email Template

To use a shared email template:

- 1 Go to the transaction and click [Email / Notes] just above the list of documents.
- 2 Select a saved template from the 'Choose a saved message template' dropdown list. You will see your own saved templates as well as those shared by other admins.
- 3 Click [Add Note] to send the message.

When selecting from the list of saved templates, type a few letters of the name of the template to narrow your selection.

A large, empty white rectangular box with a thin grey border, centered on a light green background. It is intended to represent a search or selection area for email templates.