

# Shared Email 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.

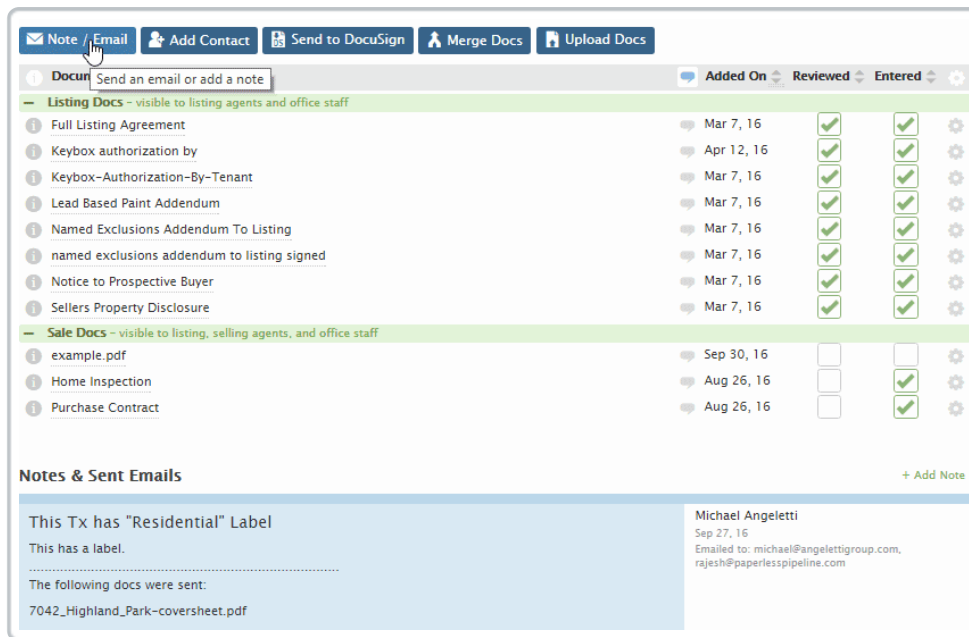
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## Save an Email Template

To save an email template:

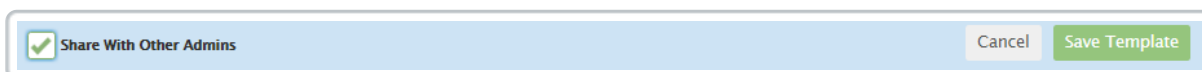
- 1 Go to the transaction and click [Note / Email] just above the list of documents.
- 2 Enter your subject and message.
- 3 Name your template.
- 4 Click the [Add Note]. This will save the template.



## Share an Email Template

To share a saved email template:

- 1 Click 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.

