Message Template Library

Explore the Message Template Library to access a wide range of prebuilt message templates for client communication, agent updates, task reminders, and more.

Who Can Do This: Anyone can view the Message Template Library. Some templates are only visible to admins.

To view the Message Template Library:
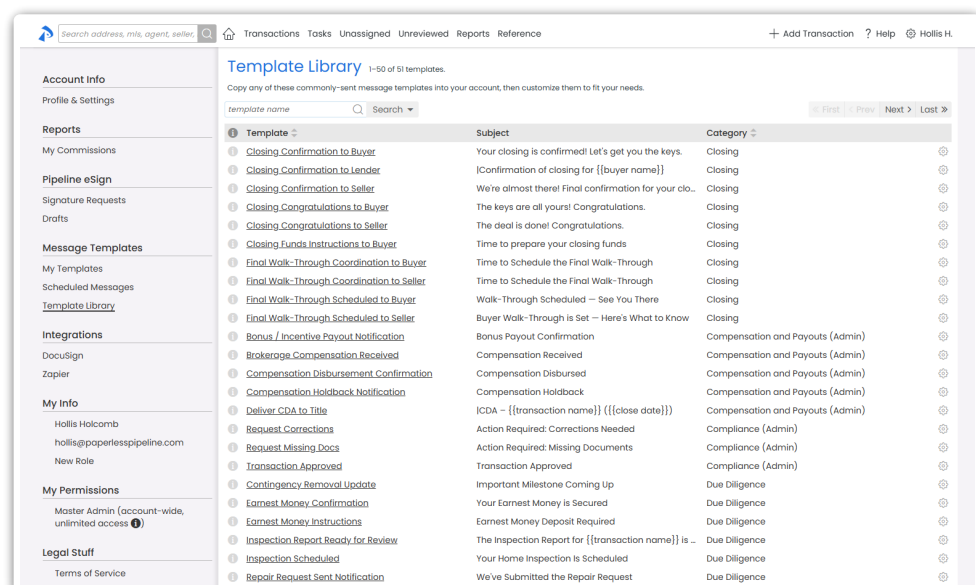
1 **Go to My Info**

- Click your name in the upper right corner, then [My Info].

2 **Open the Template Library**

- Click [Template Library] from the *Message Templates* section of the left menu.

3 **Browse Templates**

- Explore the full collection of ready-to-use message templates.

View a Template

Preview the full content of any prebuilt message template before deciding to copy it into your collection of reusable message templates.

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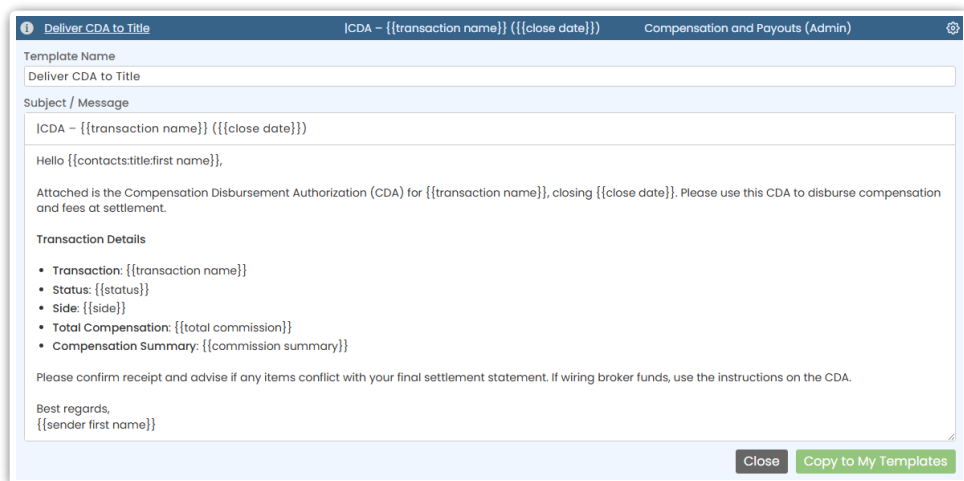
To view a prebuilt message template:

1 **Choose a Template to View**

- Browse the Message Template Library to find the template you want to preview.

2 **View the Template**

- Click the template name. A preview window will display the complete message.

Copy a Template

When you find a prebuilt template you like, copy it to your collection. Once copied, you can customize and use it like any other message template.

To copy a prebuilt message template:

1 **Choose the Template to Copy**

- Browse the Message Template Library to find the template you want to copy.

2 **Copy to Your Library**

- Click the gear icon next to the template, then [Copy to My Templates]. The template will be added to your personal collection of reusable message templates.