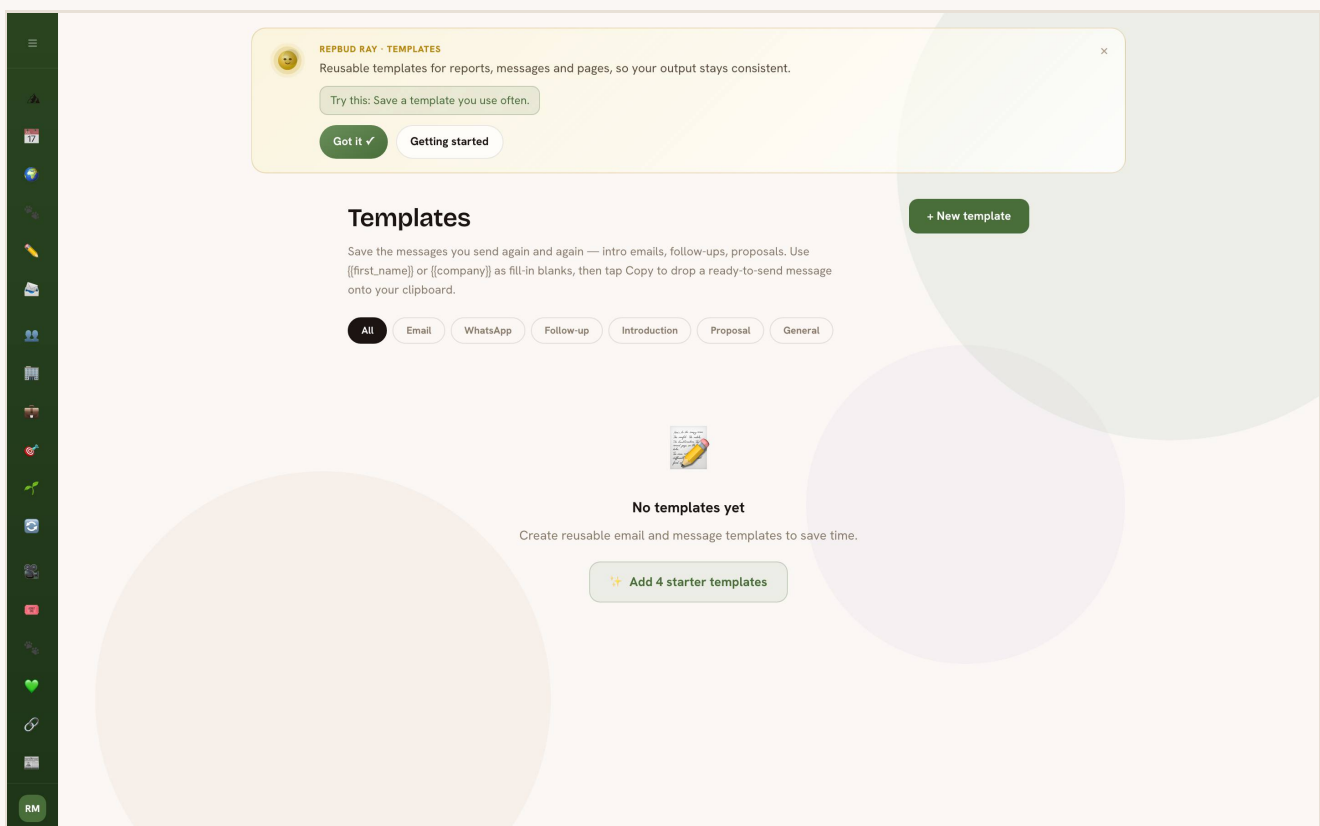


Save & reuse your message templates

Save the intros, follow-ups and proposals you send again and again — then drop a ready-to-send message onto your clipboard in two taps.

Covers `/dashboard/templates` · for rep, dmc



The steps

01 Open Templates

Templates is where you keep the messages you send again and again. A fresh account starts empty.

02 Start a new template

Give it a title and pick a category so it's easy to find later.

03 Write it with fill-in blanks

Type your message and use {{first_name}} or {{company}} as blanks you fill in each time.

04 Add a starter set

New to templates? Drop in a few professional starters and edit them to sound like you.

05 Filter by category

The category pills let you jump straight to the kind of message you need.

06 Fill & copy

Templates with blanks open a panel — type the values, watch the live preview, then copy.

07 Edit or copy as-is

Tidy any template with Edit. Templates without blanks copy straight to your clipboard.

Next: Client pages

Questions

What are the {{variables}} in a template?

They're fill-in blanks. When a template has them, tapping Fill & copy opens a panel with a field for each one and a live preview, so you can personalise the message before copying it.

Where does a copied template go?

Straight onto your clipboard, ready to paste into your email client, WhatsApp or anywhere else you write to a contact.

Can I organise my templates?

Yes — give each one a category (Email, WhatsApp, Follow-up, Introduction, Proposal or General) and use the pills at the top to filter to it.

Do I have to write every template from scratch?

No. On a fresh account, the "Add 4 starter templates" button drops in professional intro, follow-up, proposal and WhatsApp examples you can edit to suit your voice.