Viewing and Searching Message Templates - Admin Panel

Purpose: Show how to browse and search the existing templates.

Steps

1. Go to **Admin > Copilot Settings > Message Templates**.
2. If you manage more than one organization, pick the correct one from **Select Organization**.
3. Use the **Search** box above the table to filter by words from the heading or the message text.
4. Scroll through the table to review results. The **Template** column shows the message content.

Result

You can quickly find the template you need without opening each row.

Tips and good practices

- Try common keywords such as “appointment,” “reschedule,” or “payment.”
- If you cannot find a match, consider creating a new template with a unique heading.
- Review the list every few months and remove unused items to keep search results clean.

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