

How to Use Room Templates and Invitation Notes

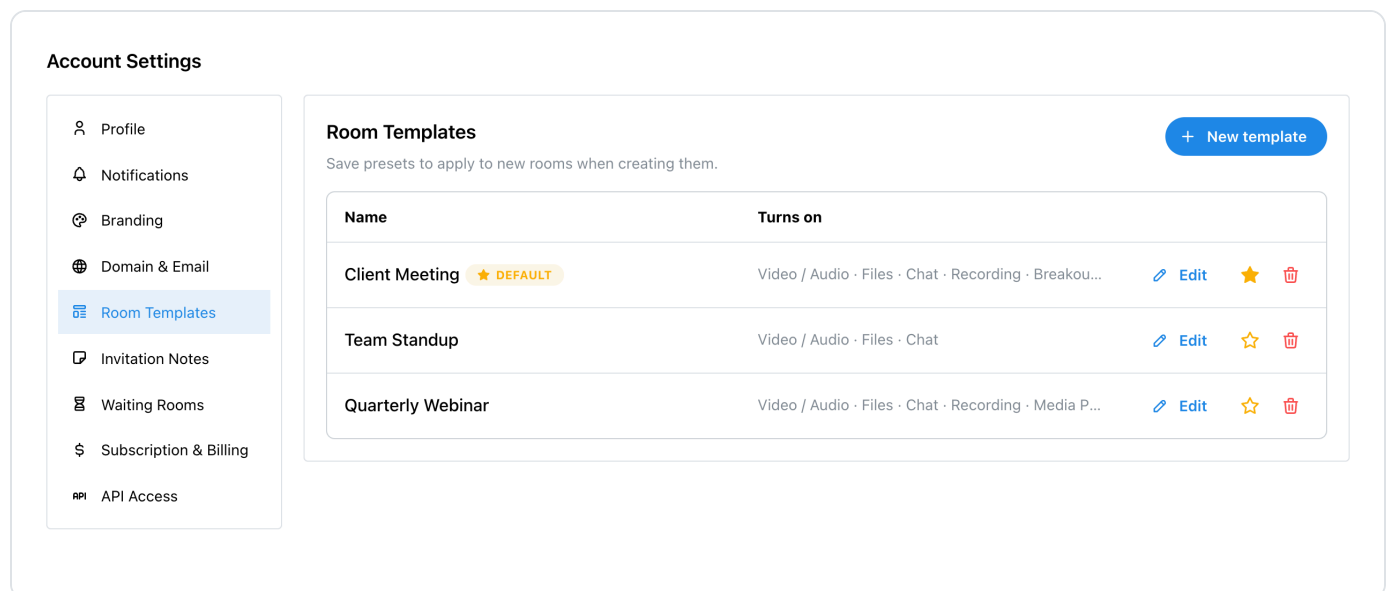
Save the settings and messages you use again and again.

Most meetings you run fall into a few kinds, and each kind uses the same settings and says the same things in its invitation. Two sections in **Settings** save you setting them up every time:

- **Room Templates:** saved room settings, applied when you create a room.
- **Invitation Notes:** saved messages, added to invitation emails.

1. Open Settings, Room Templates

Click **Settings**, then **Room Templates**. Each template is listed with the features it turns on. **Edit** opens one, the star makes it your default (step 4), and the bin deletes it. You can keep up to 10.



The screenshot shows the 'Account Settings' page. On the left is a sidebar with various settings options. The 'Room Templates' option is highlighted in blue. The main content area is titled 'Room Templates' and includes a '+ New template' button. Below this is a table listing three templates: 'Client Meeting' (marked as DEFAULT), 'Team Standup', and 'Quarterly Webinar'. Each row shows the features turned on for that template and provides links to edit, star, or delete the template.

Name	Turns on	
Client Meeting ★ DEFAULT	Video / Audio · Files · Chat · Recording · Breakou...	Edit ★
Team Standup	Video / Audio · Files · Chat	Edit ☆
Quarterly Webinar	Video / Audio · Files · Chat · Recording · Media P...	Edit ☆

2. Create a Template

Click **New template** and give it a **Template Name** you will recognize, such as “Client Meeting”. Below the name are the same settings as the room form:

- **Room Mode:** a meeting, or a webinar with Webinar Mode on.

- **Room Access:** Open, Invite Only or Invite + Guests, and the Guest Access Mode.
- **Room Features:** video, chat, files, the media player, teleconferencing, breakout rooms and the waiting room, with its alerts and screen.
- **Recording & Streaming:** recording, RTMP streaming, auto-record and the recording layouts.
- **Session:** the time limit, Lock Room and Entry Chime.

Each setting works as it does on a room; see [How to Create a Meeting Room](#) and [How to Create a Webinar Room](#). Click **Create Template** to save it.

Edit Template

×

Template Name *

Client Meeting

ROOM MODE

☒

 Webinar Mode

One-to-many broadcast. One or more speakers can join with video and audio. All other participants are view-only. With chat on, viewers can read the room chat and message hosts privately.

ROOM ACCESS

☐ Open

Anyone with the room link can join.

☐ Invite Only

Only attendees on the room's attendee list can join. Each receives a unique verification code via email.

☒ Invite + Guests

Attendees are verified via email. Anyone else can still join with limited access.

Guest Access Mode

☒ Standard

Guests join with restricted permissions and can be elevated by a Host in the room.

☐ View-Only

Guests can only watch the live video stream (if recording is active).

ROOM FEATURES

☒ Video / Audio

Live video and audio conferencing for all participants.

☒ Chat

In-room text messaging for participants.

☒ Files

Upload, present, annotate, and share files.

☒ Media Player

Play video or audio files for all participants.

3. What a Template Leaves Out

A template holds only what is the same from one meeting to the next. It never holds:

- the room name;
- a date, time or schedule;
- an attendee list;
- a webinar's registration dates. A webinar template keeps the registration settings and form, but each webinar opens and closes registration on its own dates.

So one meeting's guests can never follow a template into the next meeting.

4. Apply a Template to a New Room

When you create a room, **Room Template** at the top of the form lists your templates. Choosing one fills in every setting it holds; then add the name, the schedule and the attendees, and change anything that is different this time. Clear it to go back to **System Defaults**.

Star a template in Settings to make it your **default**: it is chosen for you every time you create a room. Click the star again to clear it.

GOOD TO KNOW: Choose the template first

Choosing or clearing a template resets the form, including the room name and the attendee list, so pick it before you fill anything in.

GOOD TO KNOW: Templates are for new rooms only

Templates are offered when creating a room, not when editing one. A template's settings are copied into the room as it is created, so editing or deleting the template later does not change rooms you have already made. (Waiting room screens work the other way: rooms show the current version of theirs. See [How to Set Up Waiting Rooms.](#))

BEST PRACTICE: One template for each kind of meeting

Two or three templates, such as "Client Meeting", "Team Standup" and "Quarterly Webinar", cover most rooms. Make the one you use most your default.

5. Save Invitation Notes

An invitation note is the message that goes with an invitation email: how to prepare, what to have ready, who to call with a problem. Click **Settings**, then **Invitation Notes**, then **New note**. Give it a **Note Name**, write the **Note**, and click **Create Note**. You can keep up to 20.

As with templates, **Edit** opens a note, the star makes it your default, and the bin deletes it.

Account Settings

- Profile
- Notifications
- Branding
- Domain & Email
- Room Templates
- Invitation Notes**
- Waiting Rooms
- Subscription & Billing
- API Access

Invitation Notes

+ New note

Save notes to load into room invitation emails. The default note is filled in for you on every new invitation.

Name	Note	
Client meeting ★ DEFAULT	Please join from a quiet place on a computer or ...	Edit ★ 🗑️
Board meeting	Board papers are in the shared folder. Please re...	Edit ★ 🗑️
Dial-in only	If you are calling in by phone, use the dial-in nu...	Edit ★ 🗑️

6. Use a Note in an Invitation

In the invitation window, **Saved Note** lists your notes, and choosing one puts its text in the **Note** box. Your default note is already there when the window opens. Edit the text for this invitation if you need to; the saved note itself is not changed. **Manage Saved Notes** takes you to Settings.

Sending invitations is covered in [How to Create a Meeting Room](#).

GOOD TO KNOW: Notes go with calendar and email invitations

SMS invitations are a short text with the room name and the link to join, so notes are not included.

Checklist

- Is there a template for each kind of meeting you run?
- Is the one you use most starred as your default?
- Does your default note say what every guest needs to know?