

What's New (April 2, 2023)

Message template scheduling

Save time and avoid oversights by auto-generating custom scheduled messages when transaction milestones are met.

You no longer need to track when messages need to be sent based on activity on a transaction. The system will now do that for you.

You can now set your *Message Templates* to automatically generate scheduled messages whenever the criteria you specify is met on a transaction. Trigger messages based on transaction dates being met or checklists tasks being completed. Once the milestone you specify has been met on a transaction, you'll be notified via email that a message has been generated for that transaction, and that it's waiting for you to review and send in your *Scheduled Messages* queue.

[Learn how to Schedule Messages Using Message Templates →](#)

The screenshot shows a web application interface for managing message templates. On the left is a sidebar with navigation links: Personal Profile, Your Commissions, Message Templates (with sub-links for Manage Templates and Scheduled Messages), Integrations (Zapier, Dropbox Sign, DocuSign), Your Info (Hollis Holcomb, email, Transaction Manager), Your Permissions (Master Admin), and Legal Stuff (Terms of Service, Privacy Policy, Billing Policy). The main content area is titled 'Message Templates' and includes a sub-header 'Create message templates so you can reuse commonly sent emails.' Below this is a table of existing templates. The table has columns for Template, Subject, Added On, Scheduled, and Shared. Two templates are listed: 'Formatting' and 'Intro to Seller'. The 'Intro to Seller' template is highlighted. Below the table is a form to create a new template, with fields for Template Name, Email Subject, and Email Body, each with an 'Add autofill tag' button. At the bottom of the form are 'Schedule Template', 'Cancel', and 'Save Template' buttons. A 'Share Template' section is also visible. At the very bottom, there is a list of recent messages sent, including 'New Admin: Message 1', 'New Agent: Message 1', and a 'Transaction Report (Buying Side)'.

Template	Subject	Added On	Scheduled	Shared
Formatting		October 7, 2021 at 9:24 p.m.	✓	ⓘ
Intro to Seller	Congrats, {{contacts:sellerfirst name}}	March 2, 2023 at 2:28 p.m.	✓	

Template Name
Intro to Seller

Email Subject
|Congrats, {{contacts:sellerfirst name}}|

Email Body
Hi {{contacts:sellerfirst name}},
Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking this journey with you.
If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate.

Share Template
Share With Everyone

[Schedule Template](#) [Cancel](#) [Save Template](#)

Autofill tag help: Formatting tips

New Admin: Message 1 | Welcome to our Paperless team! | December 23, 2021 at 7:58 p.m. ⓘ

New Agent: Message 1 | Welcome to our Paperless team! | October 15, 2021 at 9:25 a.m. ⓘ

Transaction Report (Buying Side) | {{today}} Update: {{transaction name}} - {{[... January 23, 2022 at 3:14 p.m. ⓘ

Message Templates

Create message templates so you can reuse commonly sent emails.

+ Add Message Template

Template	Subject	Added On	Scheduled	Shared
Formatting		October 7, 2021 at 9:24 p.m.		✓ ⚙
Intro to Seller	Congrats, {{contacts:seller:first name}}!	March 2, 2023 at 2:28 p.m.		✓

Template Name

Intro to Seller

Email Subject

|Congrats, {{contacts:seller:first name}}!

Add autofill tag ▾

Email Body

Hi {{contacts:seller:first name}},

Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking this journey with you.

If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate.

Add autofill tag ▾

Share Template

Share With Everyone ▾

Schedule Message ⓘ

On date:

1 calendar days after Listing Date

Remove

When task is completed:

Choose a checklist... ▾

To recipient(s):

Contact Roles

seller ✕

Transaction Roles

Click to Select

Email Addresses

Enter email addresses

Hide Schedule

Cancel Save Template

Transaction message scheduling

Draft now. Automatically send later.

When drafting a message on a transaction, you now have the option to schedule that message to be automatically sent at a later date and time.

To schedule a message, draft your message as you normally would, click [the down arrow] attached to the Send button, then select [Schedule Send]. Messages can be scheduled for an absolute date and time (e.g., April 22nd at 2pm ET), or they can be scheduled relative to a date on the transaction (e.g., 2 days after *Close Date*). Messages will automatically be sent when the schedule criteria is met, then appear on the transaction in the *Notes & Sent Emails* section, as usual. Note that all send times are in Eastern Time.

[Learn how to Schedule a Transaction Message to Send Later →](#)

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

48 Wintergreen Street

Added on Mar 2, 2023 by Hollis Holcomb
Last updated Mar 27, 2023 by Hollis Holcomb

41 Days on market

Morgan Fernandez, Seller
hollis+mf@paperlesspipeline.com 845-627-6230

Note / Email Add Contact Send to DocuSign Merge Docs Upload Docs Search Docs

Email this message to:

Listing agents Staff (4)

☐ Listing agents
 ☐ Otis Boykin
 ☐ Diana Test
 ☐ Kyndall Holcomb
 ☐ Hollis Holcomb
 ☐ Miriam Benjamin

Send to an external email address

hollis+mf@paperlesspipeline.com Enter email addresses

Subject [Congrats, {{contacts:sellerfirst name}}] Add autofill tag Message Templates Intro to Seller

Message Audio Message Add autofill tag

Hi {{contacts:sellerfirst name}},

Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking this journey with you.

If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate.

Options

☐ Make this note private (in Notes & Sent Emails below)
 ☐ Append completed tasks to message
 ☐ Send me a BCC (blind copy) of the message
 ☐ Save this message as a reusable template

Cancel

Attached Docs

☐ Send docs as zip file link
 ☐ Attach this transaction's coversheet

Check the yellow boxes of docs to attach below.

Preview Message Send Email Schedule Send

48 Wintergreen Street

Added on Mar 2, 2023 by Hollis Holcomb
Last updated Mar 27, 2023 by Hollis Holcomb

41 Days on market

Listing agents Staff (4)

☐ Listing agents
 ☐ Otis Boykin
 ☐ Diana Test
 ☐ Kyndall Holcomb
 ☐ Hollis Holcomb
 ☐ Miriam Benjamin

Send to an external email address

hollis+mf@paperlesspipeline.com Enter email addresses

Subject [Congrats, {{contacts:sellerfirst name}}] Add autofill tag Message Templates Intro to Seller

Message Audio Message Add autofill tag

Hi {{contacts:sellerfirst name}},

Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking this journey with you.

If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate.

Options

☐ Make this note private (in Notes & Sent Emails below)
 ☐ Append completed tasks to message
 ☐ Send me a BCC (blind copy) of the message
 ☐ Save this message as a reusable template

Cancel

Attached Docs

☐ Send docs as zip file link
 ☐ Attach this transaction's coversheet

Check the yellow boxes of docs to attach below.

Label Document Name

Listing Docs - visible to listing agents on this transaction and office staff

Label	Document Name	Added On	Reviewed
FIRPTA		Mar 2, 2023	<input checked="" type="checkbox"/>
HOA Addendum		Mar 2, 2023	<input checked="" type="checkbox"/>
Lead Based Paint Disclosure		Mar 2, 2023	<input checked="" type="checkbox"/>

Absolute Date Relative Date

Due Calendar Days

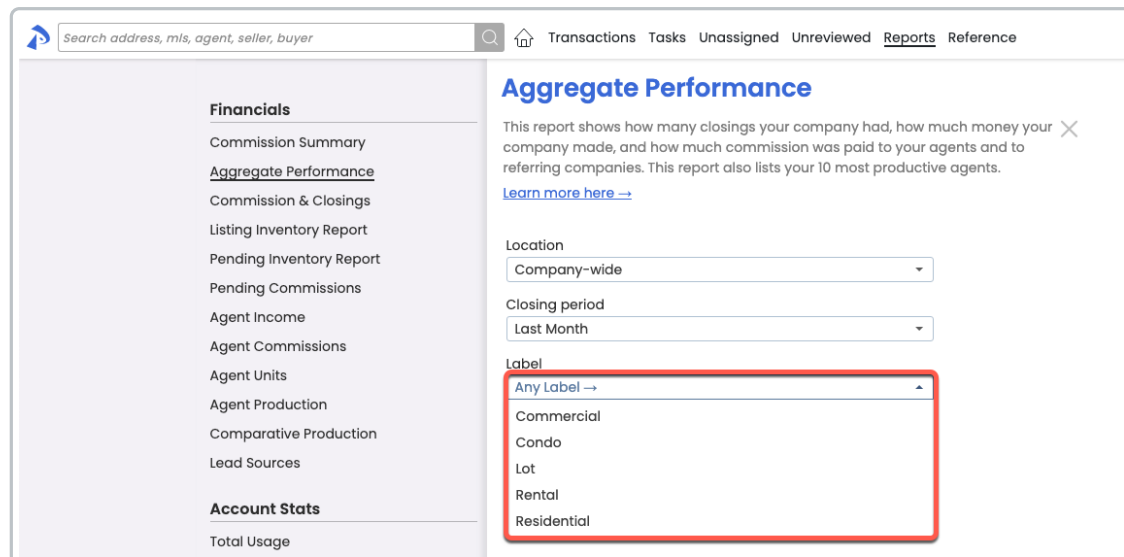
after Close Date

Schedule Send

Cancel

Learn how each property type is performing in an instant

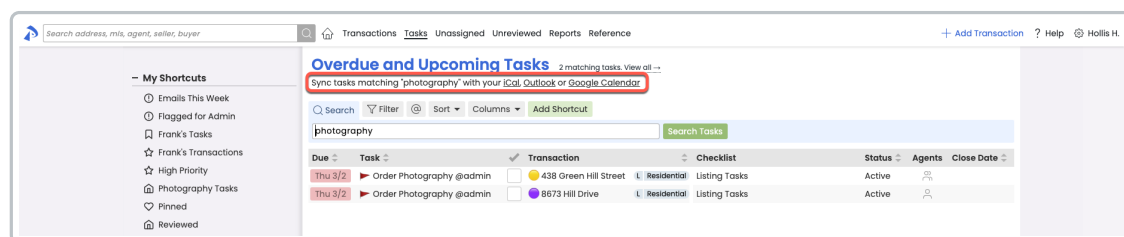
You can now run the *Aggregate Performance* report by *Transaction Label* to instantly assess how any property type is performing.



Fine-tune precisely which tasks to send to your external calendar

Whether you need to keep an eye on tasks that contain a certain phrase in the task name, tasks that are related to a particular transaction, or tasks where a specific agent has been *@Mentioned*, you can now sync tasks to your calendar based on any custom search you run on the *Tasks Page*. Enter your search criteria in the *Search* section, click [Search], then click your desired calendar link.

And keep in mind that you can set up more than one sync. If you do, set each synced calendar as a different color for easy recognition.



Include location details in your message templates automatically

Location detail Autofill Tags allow you to automatically reference a transaction location's details in your pre-defined message templates. The new *Autofill Tags* reference:

- Location address
- Location email
- Location phone number
- Location fax number

The screenshot shows the 'Message Templates' section of the Paperless Real Estate CRM interface. The left sidebar contains navigation links for Personal Profile, Your Commissions, Message Templates (active), Manage Templates, Scheduled Messages, Integrations, Zapier, Dropbox Sign, DocuSign, Your Info, Hollis Holcomb, hollis+prod@paperlesspipeline.com, Transaction Manager, Your Permissions, Master Admin (account-wide, unlimited access), and Legal Stuff.

The main content area has a top bar with tabs: Transactions, Tasks, Unassigned, Unreviewed, Reports, and Reference. Below this is the 'Message Templates' header with a subtitle 'Create message templates so you can reuse commonly sent emails.' and an '+ Add Message Template' button.

A table lists existing templates:

Template	Subject	Added On	Scheduled	Shared
Formatting		October 7, 2021 at 8:24 p.m.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Intra to Seller	[contacts:seller-first-name]!	March 2, 2023 at 2:28 p.m.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table, the details for the 'Intra to Seller' template are shown:

- Template Name:** Intra to Seller
- Email Subject:** [Contacts: {{contacts:seller-first-name}}]
- Email Body:** Hi {{contacts:seller-first-name}},

Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking

If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate.

At the bottom right, there is a dropdown menu labeled 'Add autofill tag -'. A red arrow points to it. The dropdown menu is open, showing a list of available tags: listing date, loan approval date, location (highlighted with a yellow background), location address, location email, location fax, location phone, mls, more info, multiple listings, recent first names, and recent last names. At the bottom of the dropdown are 'Cancel' and 'Save Template' buttons.