What's New (April 2, 2023)
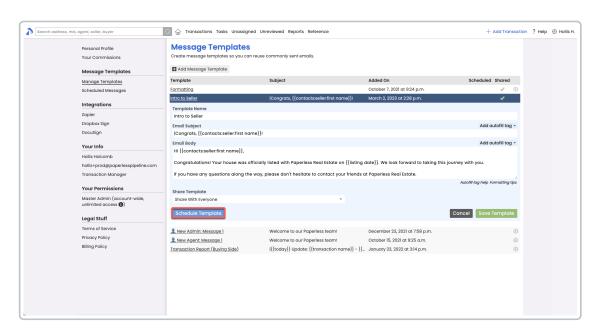
Message template scheduling
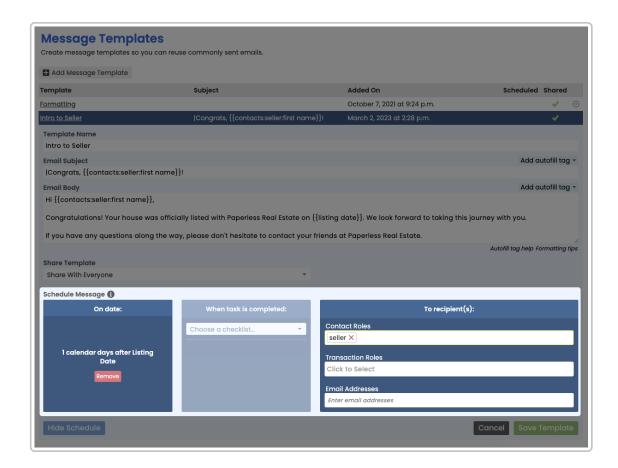
Save time and avoid oversights by auto-generating custom scheduled messages when transaction milestones are met.

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.

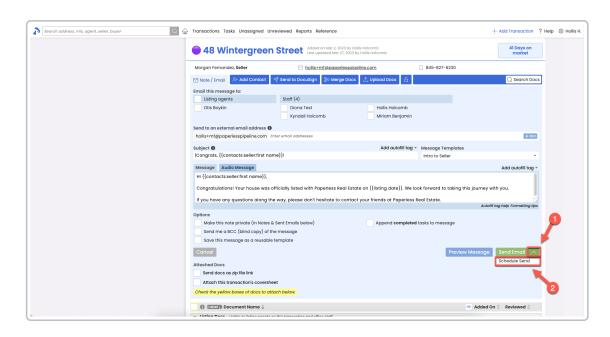Learn how to Schedule Messages Using Message Templates →
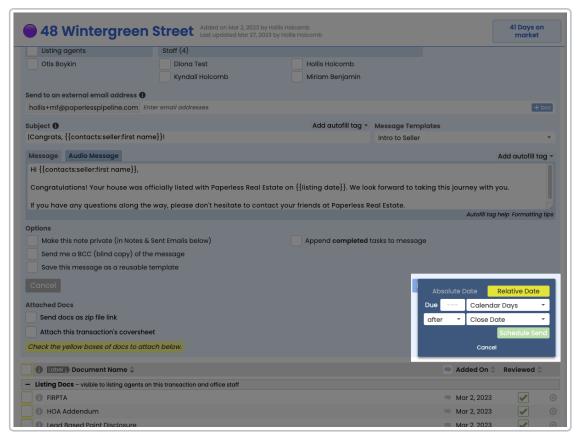
Transaction message scheduling

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.

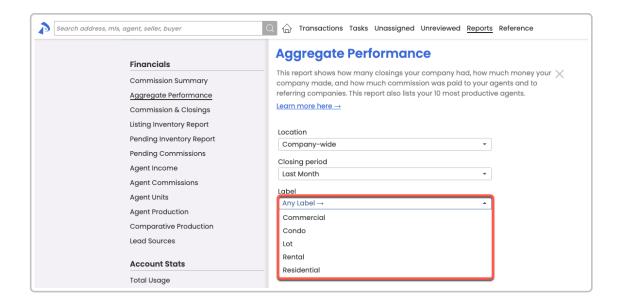Learn how to Schedule a Transaction Message to Send Later →

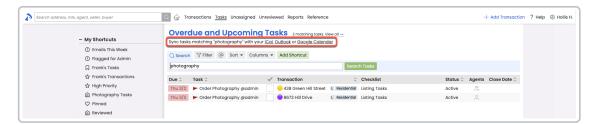Learn how each property type is performing in an instant

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

Personal Profile
Your Commissions

Message Templates
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 ⓘ)

Legal Stuff

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   Add autofill tag ▾
|Congrats, {{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.

Choose an autofill tag: ✕
- listing date
- loan approval date
- location
- location address
- location email
- location fax
- location phone
- mls
- more info
- outside listing agent first name

Share Template
Share With Everyone ▾

Schedule Template   Cancel   Save Template