Your Message Templates

Your Message Templates help you save time by allowing you to create, save, and reuse messages that you send frequently. Pair them with Autofill Tags to let Pipeline automatically insert transaction-specific information and do the typing for you.

Introduction

Message Templates save you time by allowing you to save and reuse messages you send frequently. To maximize your time savings, pair Message Templates with Autofill Tags to allow Pipeline to automatically insert specified information from each transaction and do the typing for you.

How It Works

Message Templates are built around a simple "create once, use often" model.

Personal Template Collection

Every user has a personal library where they can create, edit, and manage their own message templates. This keeps your frequently used messages organized and accessible from any transaction.

Autofill Tags for Dynamic Content

Templates become powerful when used with Autofill Tags. These are placeholders, like [Closing Date] or [Agent First Name], that automatically pull specific information from the transaction into your message. This personalizes your communication without manual typing.

Sharing for Team Consistency

Admins can share templates with other admins or with everyone in the account. This ensures that the entire team uses consistent, professional language for common communications.

View Your Saved Templates

> Access the area where all of your personal and shared message templates are stored and managed.

> **Who Can Do This**: Anyone can view message templates they created.

To view your saved message templates:

Go to My Info

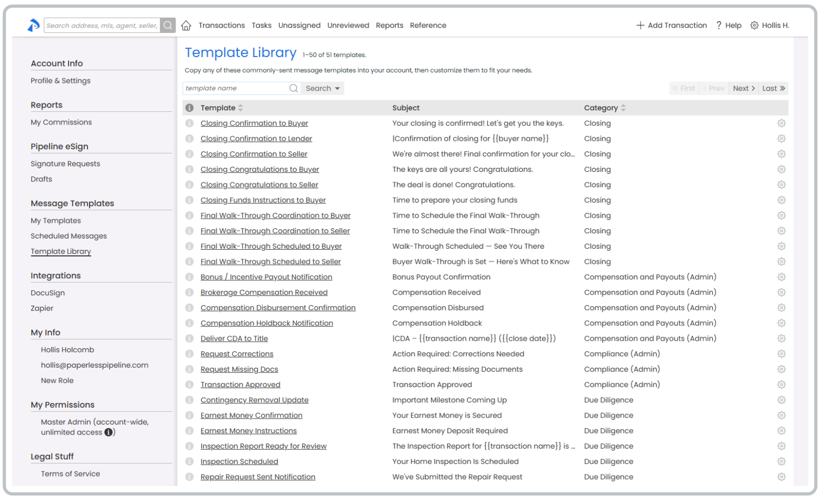
- Click your name in the upper right corner, then [My Info].

Open Your Templates

- Click [My Templates] from the *Message Templates* section of the left menu.

Browse Your Templates

- View your full collection of created templates.



Create a Message Template

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

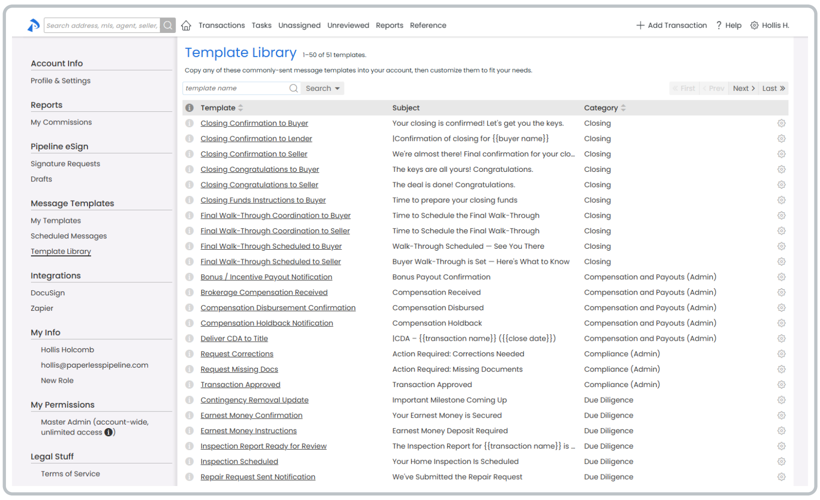
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Save a Template While Sending

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

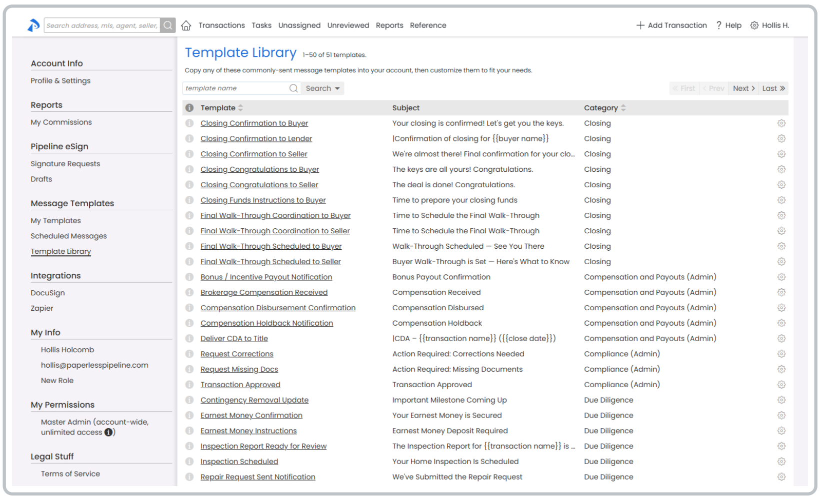
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Use the Template Library

Edit a Message Template

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

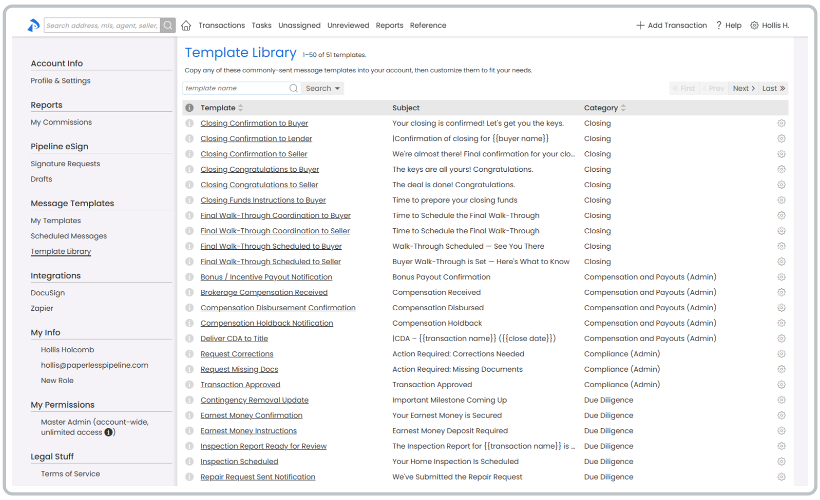
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Delete a Message Template

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

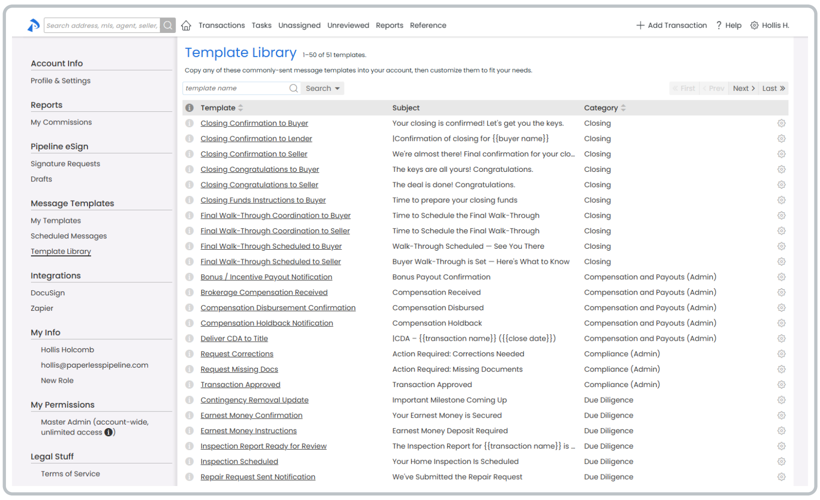
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Share a Message Template

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

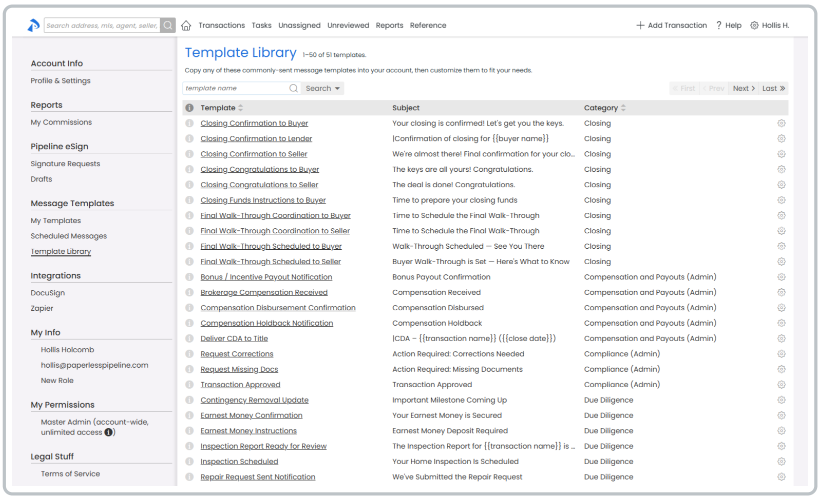
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Schedule a Message Template

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

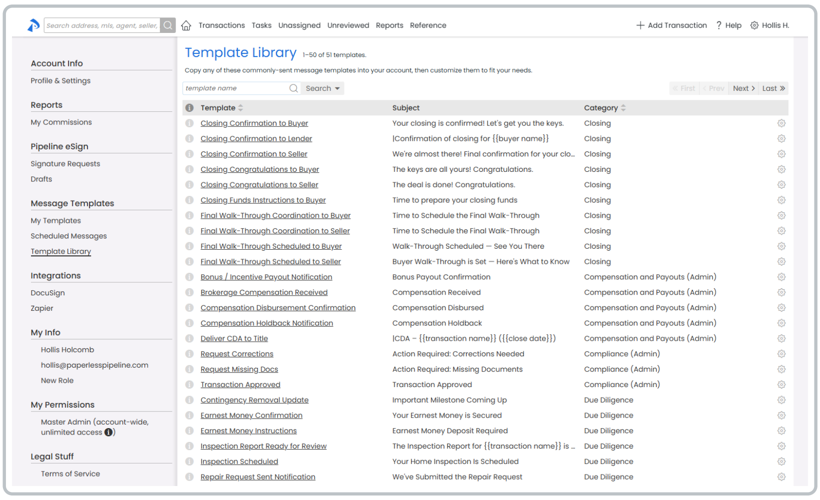
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Use a Saved or Shared Message Template