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 your personal message templates to create, update, and reuse messages, keeping communication clear and on brand.

Who Can Do This: You can view and manage any personal templates you've created.

To view your personal message templates:

Go to My Info

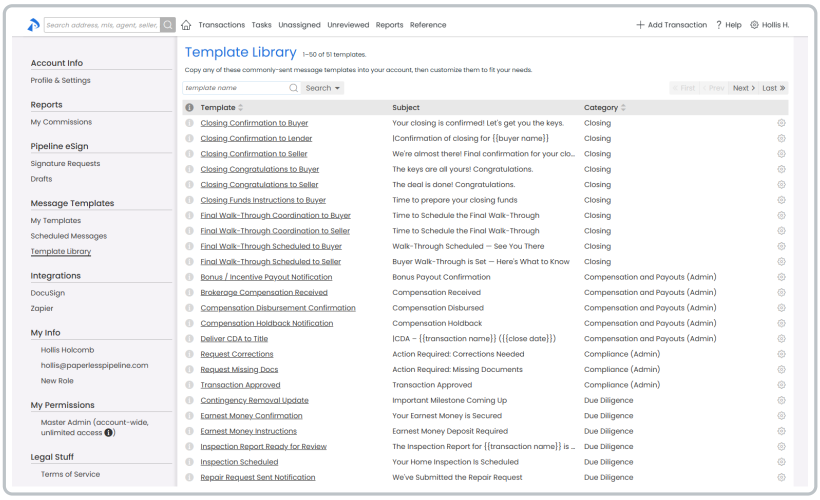
- Click your name in the upper right corner, then [My Info].

Open Your Templates

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

Browse Your Templates

- See your full collection of saved templates, ready to use or update whenever you need them.



Create Message Templates

Create reusable templates for the messages you send most often, saving time and ensuring consistency.

Learn how to Create Message Templates

Edit a Message Template

Update your saved templates to keep messages current, accurate, and aligned with your communication style and brand.

Who Can Do This: You can edit any message templates you've created.

To edit a message template:

Choose a Message to Edit

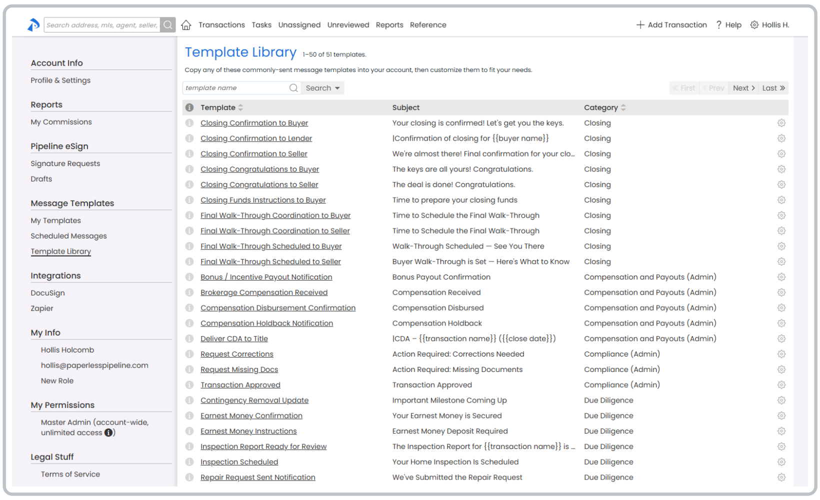
- Access your message templates to find the message you want to make changes to.

Open the Template

- Click the name of the template you want to edit.

Edit and Save

- Make your changes, then save the template to use it again with the updated content.



Delete a Message Template

Remove a template you no longer need.

Who Can Do This: You can delete any message templates you've created.

To delete a message template:

Choose a Message to Delete

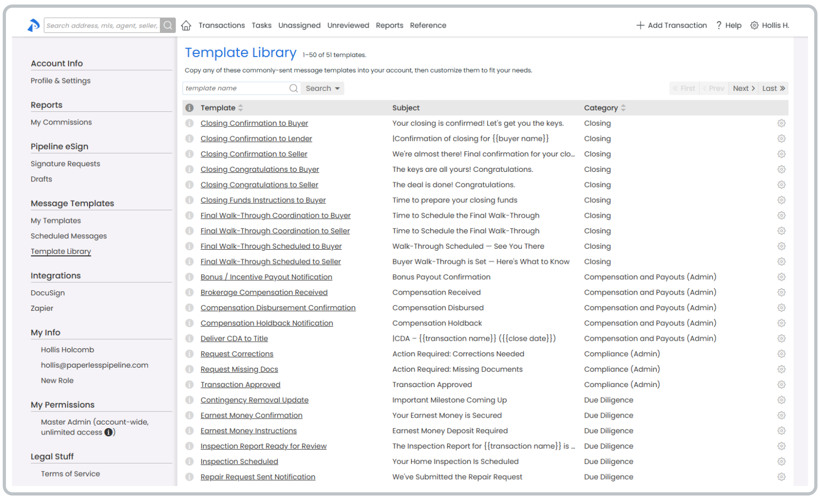
- Access your message templates to find the template you want to remove.

Delete the Template

- Click the gear next to the template, then [Delete].

Confirm Deletion

- Click [delete] again to confirm. The template will be removed.



Share Message Templates

Schedule Message Templates

Use Message Templates