

# 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**

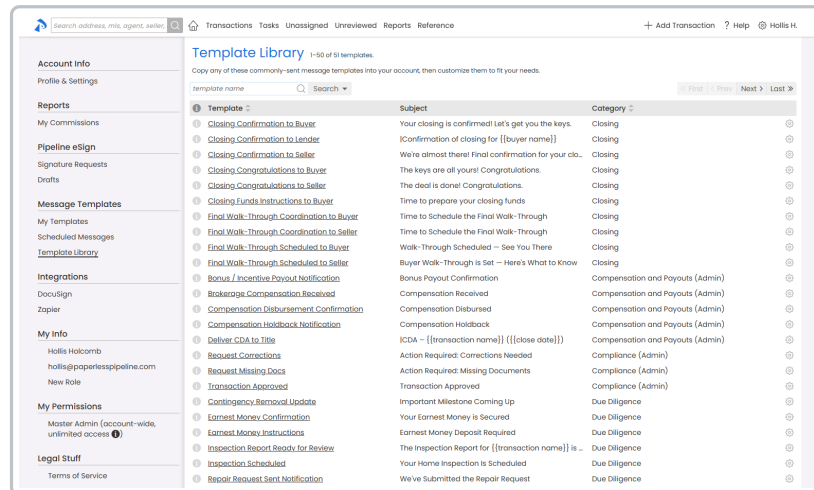
- Click your name in the upper right corner, then [My Info].

### 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

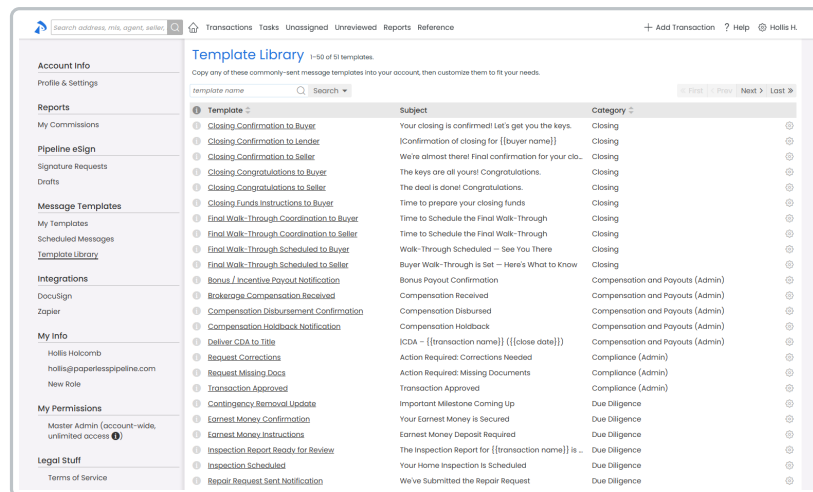
- Click your name in the upper right corner, then [My Info].

### 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

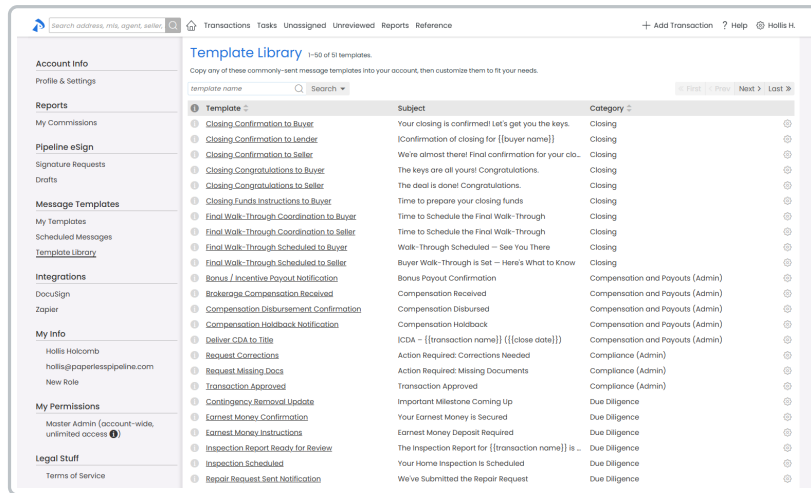
- Click your name in the upper right corner, then [My Info].

### 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

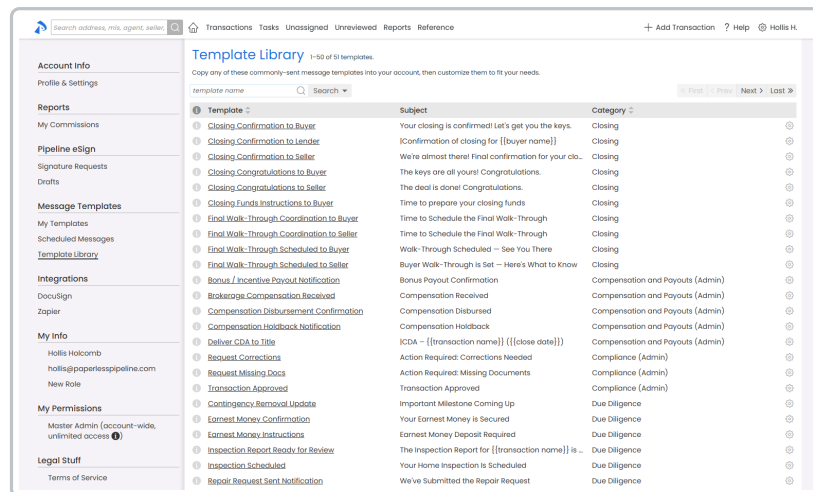
- Click your name in the upper right corner, then [My Info].

### 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

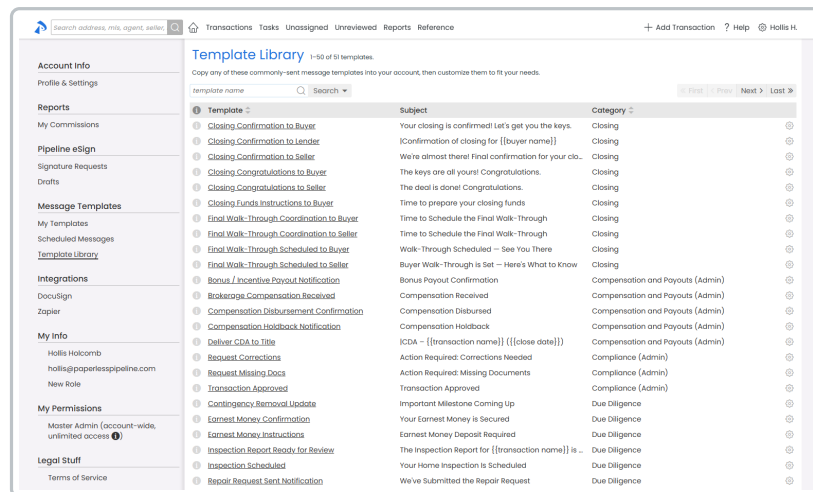
- Click your name in the upper right corner, then [My Info].

### 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

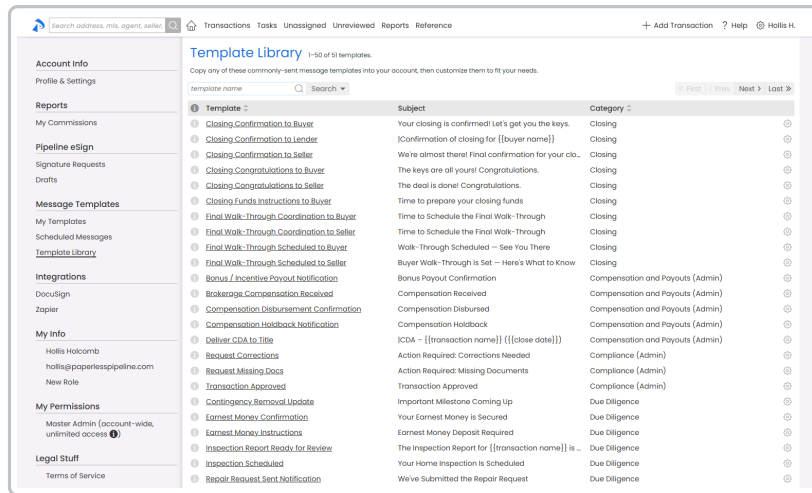
- Click your name in the upper right corner, then [My Info].

### 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.

Search address, role, agent, seller

TransactionsTasksUnassignedUnreviewedReportsReference

+ Add Transaction ? Help @ Hollis H.

Account Info

Profile & Settings

Reports

My Commissions

Pipeline eSign

Signature Requests

Drafts

Message Templates

My Templates

Scheduled Messages

Template Library

Integrations

DocuSign

Zapier

My Info

Hollis Holcomb

hollis@paperlesspipeline.com

New Role

My Permissions

Master Admin (account-wide, unlimited access)

Legal Stuff

Terms of Service

Template Library

1-50 of 31 templates

Copy any of these commonly-sent message templates into your account, then customize them to fit your needs.

template name

Search

FirstPreviousNextLast

Template	Subject	Category
Closing Confirmation to Buyer	Your closing is confirmed! Let's get you the keys.	Closing
Closing Confirmation to Lender	[Confirmation of closing for [Buyer name]]	Closing
Closing Confirmation to Seller	We're almost there! Final confirmation for your clo...	Closing
Closing Congratulations to Buyer	The keys are all yours! Congratulations.	Closing
Closing Congratulations to Seller	The deal is done! Congratulations.	Closing
Closing Funds Instructions to Buyer	Time to prepare your closing funds	Closing
Final Walk-Through Coordination to Buyer	Time to Schedule the Final Walk-Through	Closing
Final Walk-Through Coordination to Seller	Time to Schedule the Final Walk-Through	Closing
Final Walk-Through Scheduled to Buyer	Walk-Through Scheduled -- See You There	Closing
Final Walk-Through Scheduled to Seller	Buyer Walk-Through is Set -- Here's What to Know	Closing
Bonus / Incentive Payout Notification	Bonus Payout Confirmation	Compensation and Payouts (Admin)
Brokerage Compensation Received	Compensation Received	Compensation and Payouts (Admin)
Compensation Disbursement Confirmation	Compensation Disbursed	Compensation and Payouts (Admin)
Compensation Holdback Notification	Compensation Holdback	Compensation and Payouts (Admin)
Deliver CDA to Title	ICDA - [[transaction name]] ([[close date]])	Compensation and Payouts (Admin)
Request Corrections	Action Required: Corrections Needed	Compliance (Admin)
Request Missing Docs	Action Required: Missing Documents	Compliance (Admin)
Transaction Approved	Transaction Approved	Compliance (Admin)
Contingency Removal Update	Important Milestone Coming Up	Due Diligence
Earnest Money Confirmation	Your Earnest Money is Secured	Due Diligence
Earnest Money Instructions	Earnest Money Deposit Required	Due Diligence
Inspection Report Ready for Review	The Inspection Report for [[transaction name]] is ...	Due Diligence
Inspection Scheduled	Your Home Inspection is Scheduled	Due Diligence
Repair Request Sent Notification	We've Submitted the Repair Request	Due Diligence

Use a Saved or Shared Message Template