

Autofill Tags

Send documents and messages into Paperless Pipeline by emailing them to your personal maildrop addresses.

Introduction

Paperless Pipeline employs a comprehensive security framework that incorporates server security, data encryption, and login protocols.

Leveraging industry-standard SSL encryption and Amazon Web Services (AWS) 's world-class server infrastructure, Paperless Pipeline provides the same level of data protection and redundancy as an online bank.

How It Works

Each doc area in Pipeline matches a step in your workflow.

Reference Docs

Your office-wide forms, templates, and shared files. It's your central library, anyone can view and send from here.

Unassigned Docs

Docs that have been uploaded but aren't yet tied to a transaction. Use this area to review and sort incoming files.

Transaction Docs

The core workspace for each deal. Your team shares, reviews, comments, and tracks docs here.

Unreviewed Docs

A focused view for compliance staff and brokers. Shows what's still pending review—without needing to open each transaction.

Add Autofill Tags

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

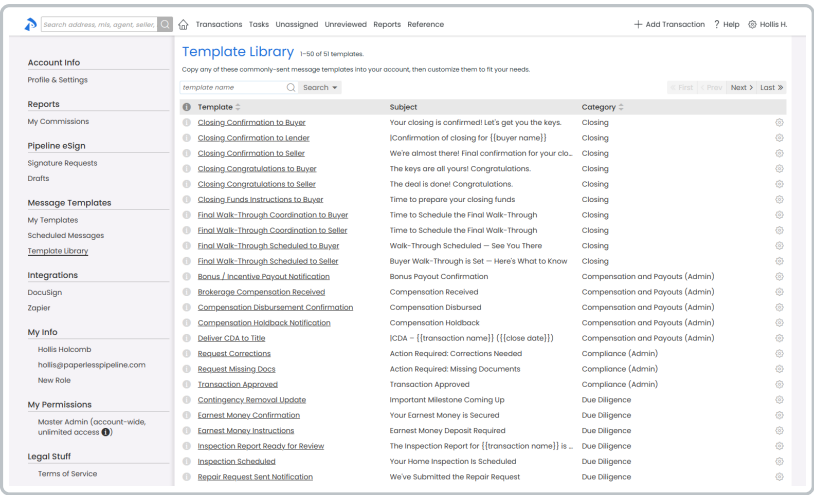
- Click your name in the upper right corner, then [My Info].

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.



Add Advanced Checklist Autofill Tags

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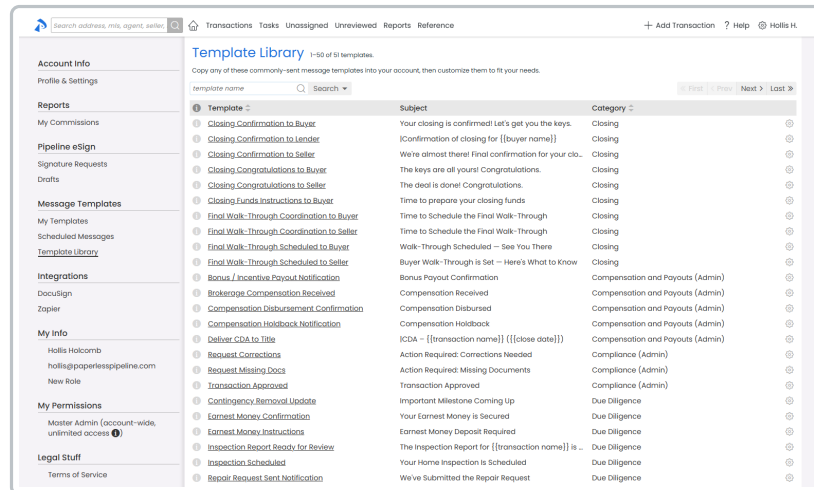
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Add Advanced Contact Autofill Tags

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.

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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 nameSearch

FirstPrevNextLast

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