Autofill Tags

Autofill Tags save time by automatically inserting transaction details into your messages, keeping client and team communication accurate and personalized.

Introduction

Sending messages from Pipeline is faster and more consistent with Message Templates. Autofill Tags take this a step further by pulling in live transaction data like names, dates, and checklist tasks directly into your message subject or body.

Instead of retyping details, you drop in a tag, and Pipeline fills in the right information every time. This reduces errors, ensures professionalism, and streamlines repetitive communications.

How It Works

Standard Autofill Tags

Inserted from the [Add autofill] button while editing a template.

Pull in standard transaction details like address, client name, or agent.

Advanced Autofill Tags

Typed manually for custom data like contacts and checklist tasks.

Examples:

- `{{contacts:Attorney:phone}}` → Attorney's phone number.
- `{{checklist:Closing Timeline:Appraisal:due date}}` → Appraisal due date.

Automatic Replacement

When a template is sent, placeholders are replaced instantly with live data.

Example:

- `{{contacts:escrow:company}}` → ABC Title
- `{{checklist:Listing Checklist:Listing Agreement:due date}}` → Mon, Mar 16, 2020

Add Autofill Tags

> Add an Autofill Tag to automatically insert transaction details, such as addresses or client names, into your message or template.

Who Can Do This: Anyone.

To add Autofill Tags to a message:

Start a Message or Template

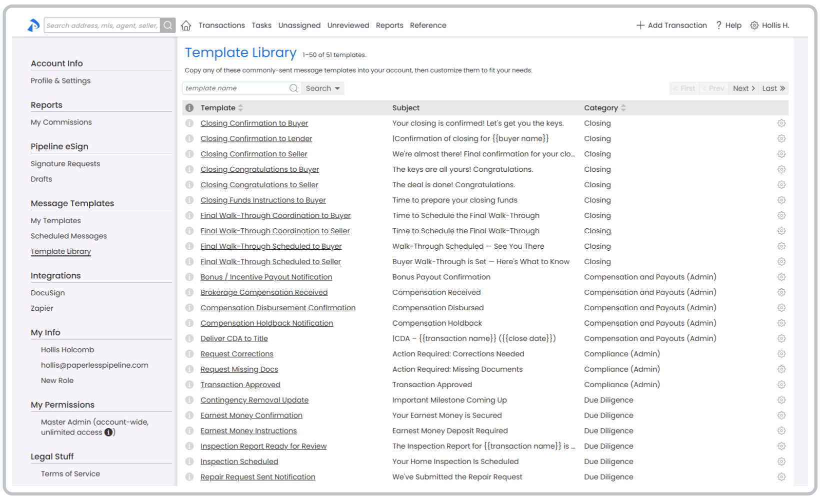
- You can add Autofill Tags while sending a message from a transaction or while creating a message template to reuse later.

Place Your Cursor Where You Want Information Inserted

- In the Subject or Body of your message, click where you want the tag to appear.

Open the Autofill Tag Menu

- Click [Add Autofill Tag].
- Scroll or type to find the tag you need.



Send the Message or Save Your Template

- Finish sending the message or save the template to be used later.
- The tag will autofill when the message is sent.

Add Advanced Contact Autofill Tags

Add an Advanced Contact Autofill Tag to automatically insert details like phone numbers, email addresses, or company names for a specific contact role.

Who Can Do This: Anyone.

To add an Advanced Contact Autofill Tag to a message:

Start a Message or Template

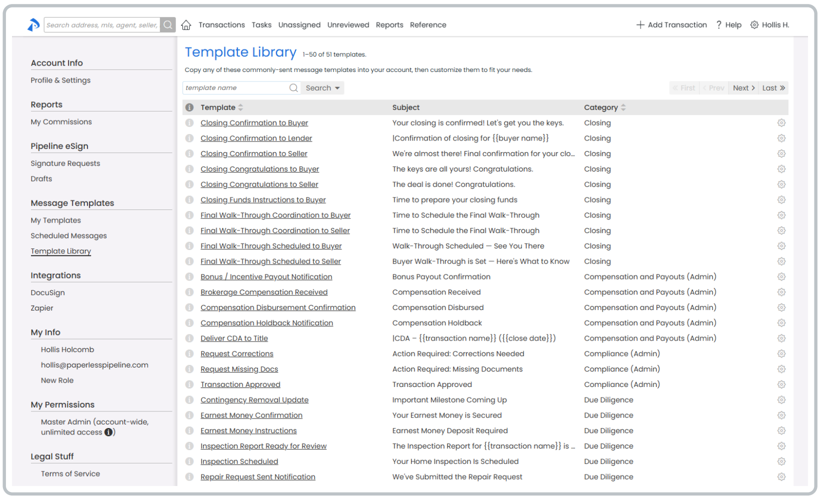
- You can add Autofill Tags while sending a message from a transaction or while creating a message template to reuse later.

Type or Paste the Contact Tag Into the Message

- Enter the advanced contact tag directly into the Subject or Body.
- Examples:
  - `{{contacts:ROLE:first name}}` → Contact's first name
  - `{{contacts:ROLE:phone}}` → Contact's phone number
- See the Full Autofill Tag Reference for the complete list of autofill tags.

Replace Placeholder Text With Real Roles

- Replace `ROLE` with a contact role, like escrow or attorney.



Send the Message or Save Your Template

- Finish sending the message or save the template to be used later.
- The tag will autofill when the message is sent.

Add Advanced Checklist Autofill Tags

Add an Advanced Checklist Autofill Tag to automatically insert entire checklists or specific task due dates into your messages.

Who Can Do This: Anyone.

To add an Advanced Checklist Autofill Tag to a message:

Start a Message or Template

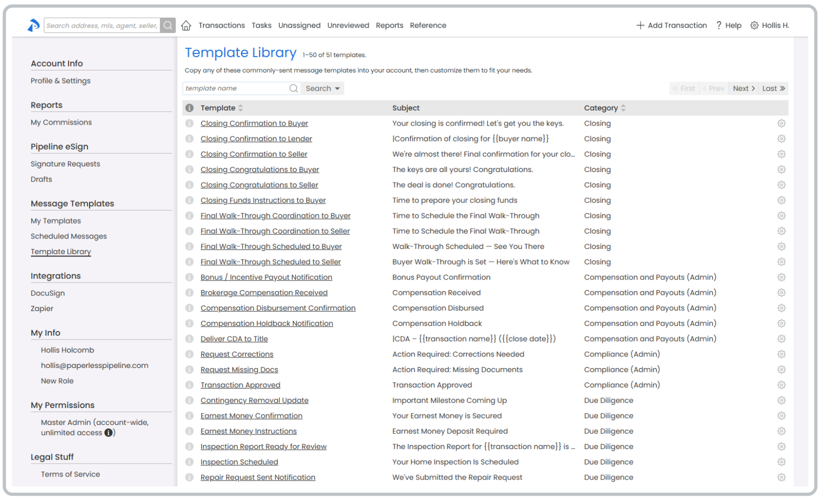
- You can add Autofill Tags while sending a message from a transaction or while creating a message template to reuse later.

Type or Paste the Checklist Tag Into the Message

- Enter the advanced checklist tag directly into the Subject or Body.
- Examples:
  - `{{checklist:NAME OF CHECKLIST}}` → Entire checklist
  - `{{checklist:NAME OF CHECKLIST:TASK NAME:due date}}` → Due date for a task
- See the Full Autofill Tag Reference for the complete list of autofill tags.

Replace Placeholder Text With Real Checklist Names and Tasks

- Replace `NAME OF CHECKLIST` with the checklist title.
- Replace `TASK NAME` with the specific task name.



Send the Message or Save Your Template

- Finish sending the message or save the template to be used later.
- The tag will autofill when the message is sent.

Full Autofill Tag Reference

Autofill Tags for Hard-coded Transaction Fields

These tags are available directly from the Autofill Tag menu. Use them to automatically insert transaction details such as dates, prices, and parties into your messages or templates.

Acceptance Date

`{{acceptance date}}`

Added By

`{{added by}}`

Added On

`{{added on}}`

Agent First Names

`{{agent first names}}`

Agent Full Names

`{{agent full names}}`

Buyer First Name

`{{buyer first name}}`

Buyer Name

`{{buyer name}}`

Buying Agent First Names

`{{buying agent first names}}`

Buying Agent Full Names

`{{buying agent full names}}`

Close Date

`{{close date}}`

Commission Summary

`{{commission summary}}`

Expiration Date

`{{expiration date}}`

Key Dates

`{{key dates}}`

Label

`{{label}}`

List Price

`{{list price}}`

Listing Agent First Names

`{{listing agent first names}}`

Listing Agent Full Names

`{{listing agent full names}}`

Listing Date

`{{listing date}}`

Location

`{{location}}`

Location Address

`{{location address}}`

Location Email

`{{location email}}`

Location Fax

`{{location fax}}`

Location Phone

{{location phone}}

MLS

{{mls}}

More Info

{{more info}}

Outside Listing Agent First Name

{{outside listing agent first name}}

Outside Listing Agent Full Name

{{outside listing agent full name}}

Outside Selling Agent First Name

{{outside selling agent first name}}

Outside Selling Agent Full Name

{{outside selling agent full name}}

Sale Price

{{sale price}}

Seller First Name

{{seller first name}}

Seller Name

{{seller name}}

Selling Agent First Names

{{selling agent first names}}

Selling Agent Full Names

{{selling agent full names}}

Sender First Name

`{{sender first name}}`

Sender Full Name

`{{sender full name}}`

Side

`{{side}}`

Status

`{{status}}`

Today

`{{today}}`

Total Commission

`{{total commission}}`

Transaction Name

`{{transaction name}}`

Autofill Tags for Custom and Optional Fields

These tags are available directly from the Autofill Tag menu. Use them to pull values from your Custom or Optional Fields. Pick the exact field name from the list. Tags show only if your company has set up that field.

Your Company's Custom Fields

`{{YOUR COMPANY'S CUSTOM FIELD}}`

Your Company's Optional Fields

`{{YOUR COMPANY'S OPTIONAL FIELD}}`

Advanced Autofill Tags for Contacts

Use these advanced tags to pull details from specific contact roles on a transaction (e.g., `escrow`, `attorney`, `lender`). Replace `ROLE` with the actual role name in your system.

Company

`{{contacts:ROLE:company}}`

`{{contacts:escrow:company}}`

ABC Title

Fax

`{{contacts:ROLE:fax}}`

`{{contacts:escrow:fax}}`

310-555-1212

Role

`{{contacts:ROLE:role}}`

`{{contacts:escrow:role}}`

Escrow

First Name

`{{contacts:ROLE:first name}}`

`{{contacts:escrow:first name}}`

Charles

Name

`{{contacts:ROLE:name}}`

`{{contacts:escrow:name}}`

Charles Ghould

Email

`{{contacts:ROLE:email}}`

`{{contacts:escrow:email}}`

charles@abctitle.com

Phone

`{{contacts:ROLE:phone}}`

`{{contacts:escrow:phone}}`

310-555-1263

Transaction Note

`{{contacts:ROLE:transaction note}}`

`{{contacts:escrow:transaction note}}`

Out of office on Tuesdays

Advanced Autofill Tags for Checklists

Use these advanced tags to pull data from checklists and their tasks. Replace `NAME OF CHECKLIST` with the actual checklist title, and `TASK NAME` with the exact task name.

Entire Checklist

`{{checklist:NAME OF CHECKLIST}}`

`{{checklist:Required Listing Documents Residential}}`

Required Listing Documents Residential

[ ] Mold Discl.

[ ] HOA

[ ] Seller's Property Disclosure

[ ] Notice to Prospective Buyer *(Due: 1 day after Acceptance)*

[✓] Lead based paint (if applicable) *(checked by Jim Smith on Mar 16, 2020)*

Due Date

`{{checklist:NAME OF CHECKLIST:TASK NAME:due date}}`

`{{checklist:Pending checklist:Purchase and sales agreement:due date}}`

Mon, Mar 16, 2020