

Sharing Message Templates

A one-sentence headline summary highlighting the benefit.

Introduction

Start with a short paragraph that:

- Names the feature/topic
- Explains its purpose or problem solved
- Emphasizes the main benefit(s) to the user

Example: [Feature/Topic] helps you [do X faster / avoid Y / ensure Z]. Instead of [old pain point], you can [new efficient workflow].

Share a Template with Everyone

Explore the Message Template Library to access a wide range of prebuilt message templates for client communication, agent updates, task reminders, and more.

Who Can Do This: Anyone can view the Message Template Library. Some templates are only visible to admins.

To view the Message Template Library:

Go to **My Info**

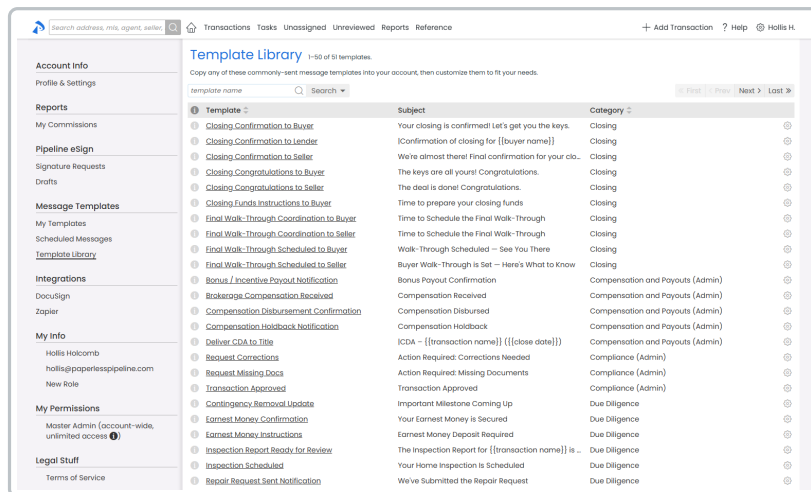
- Click your name in the upper right corner, then [My Info].

Open the Template Library

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

Browse Templates

- Explore the full collection of ready-to-use message templates.



Share a Template with Other Admins

Explore the Message Template Library to access a wide range of prebuilt message templates for client communication, agent updates, task reminders, and more.

Who Can Do This: Anyone can view the Message Template Library. Some templates are only visible to admins.

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

- Explore the full collection of ready-to-use message 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 51 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

Using Message Templates