# Autofill Tags

SUMMARY
Learn how *Autofill Tags* within *Message Templates* allow Pipeline to do the typing for you. When you use *Autofill Tags* within *Message Templates* to send a note or email, information from the transaction will be added to your message automatically.

IN THIS ARTICLE



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- Autofill Tags
- Advanced Checklist & Contact Autofill Tags

## Introduction

Sending messages from Pipeline is the most effective way of communicating with your team and contacts about a transaction. Pipeline's *Message Templates* allow you to make the process of sending messages, especially frequently sent or long messages, a breeze. And using *Autofill Tags* within those templates super charges them, allowing the system to automatically pre-fill specific, personalized transaction information into the message and saving you time over and over again.

## Who Can Do This?

All Pipeline users can use *Autofill Tags* in *Message Templates.*

## How To

### Use Autofill Tags

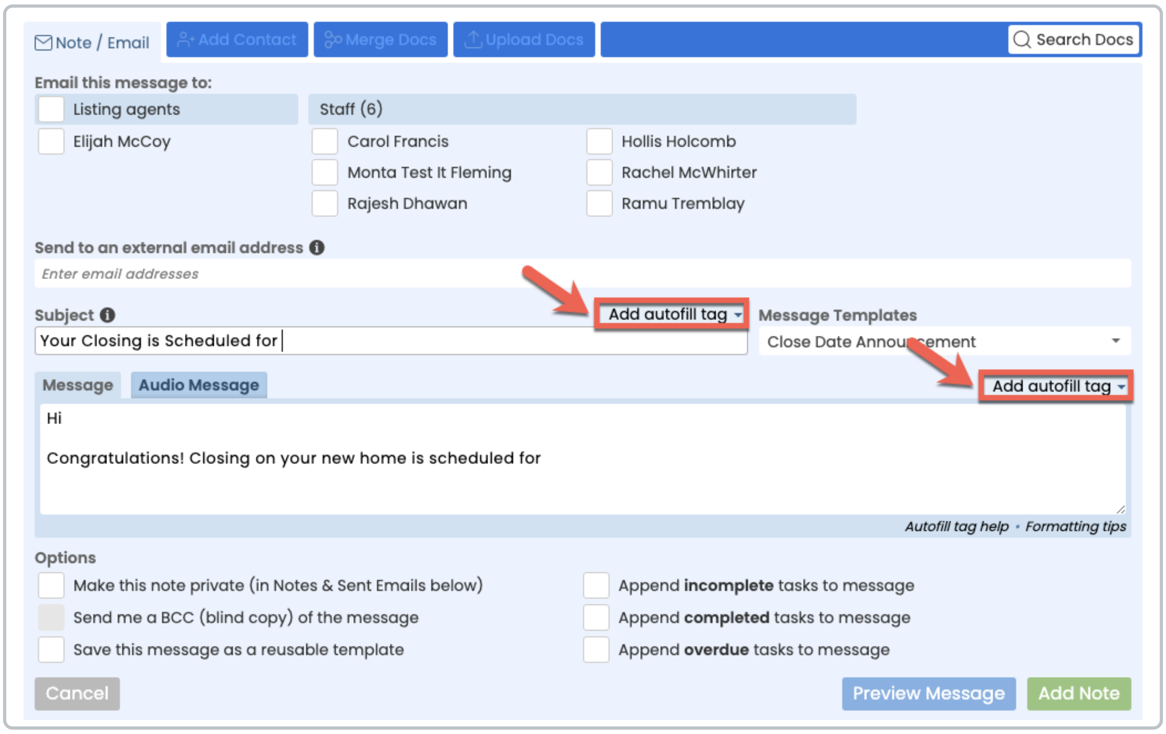
To use *Autofill Tags* in a *Message Template:*

1 **Create a new *Message Template* or edit an existing one.** [Learn how to Create & Manage Message Templates →]

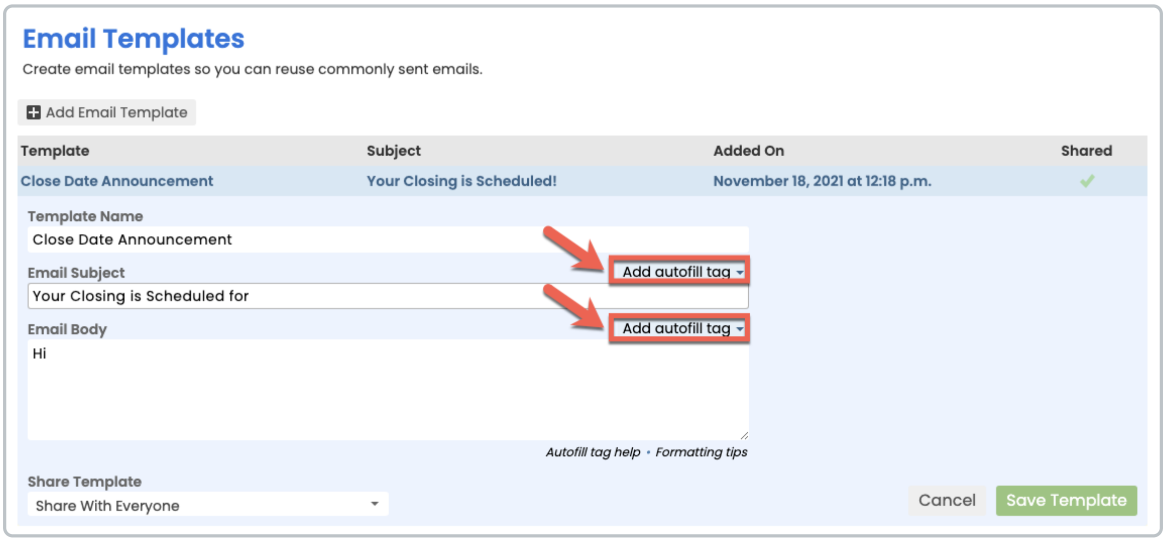
2 When entering the *Subject* or *Body* of your message, **place your cursor where you want to enter the *Autofill Tag*.**

3 To the right of the *Subject* or *Body*, **select [Add autofill] tag.**

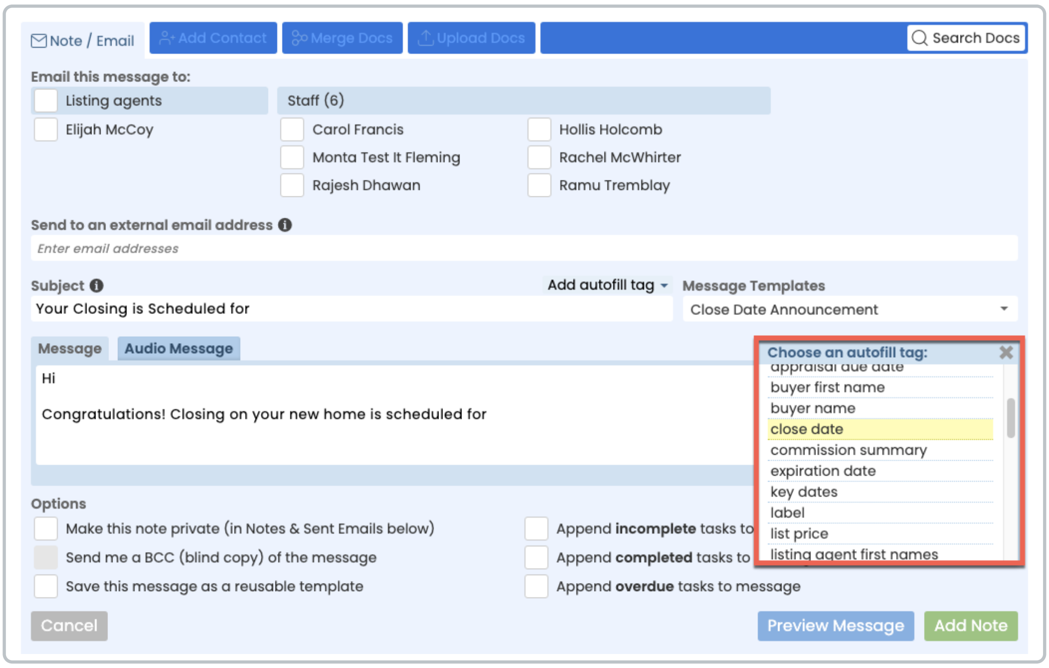
*On a transaction*




*From the Message Templates area*

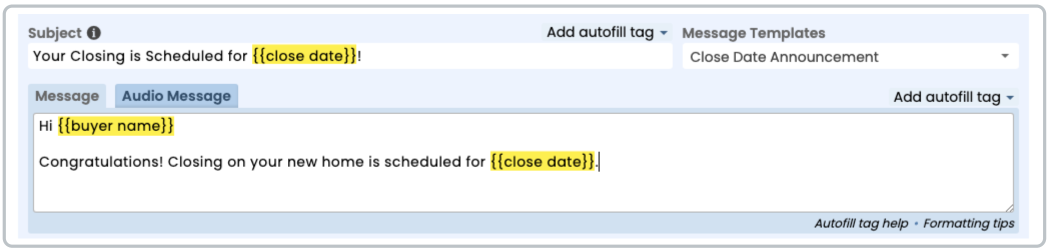



4 **Scroll through the list of *Autofill Tags*, or start typing your desired transaction field to refine the list of options.**




Find *Autofill Tags* fast by typing any part of the *Autofill Tag* name while the list is displayed.

5. **Select your desired *Autofill Tag*** to insert a placeholder for the transaction field into your message.




6. When your message template is complete, **click [Save Template].**

## Use Advanced Autofill Tags

*Advanced Autofill Tags* are additional *Autofill Tags* that do not appear in the *Autofill Tags* drop down menu because they contain custom information from your account. These advanced tags allow you to automatically insert specified contact information, checklists, and task due dates.

To insert *Advanced Autofill Tags* in a *Message Template*:

1. **Create a new message template or edit an existing one.** Learn how to Create & Manage Message Templates →

2 When entering the *Subject* or *Body* of your message, **type or paste your desired tag from the list of either** Advanced Contact Autofill Tags or Advanced Checklist Autofill Tags to insert it into your message.

For example, to autofill a contact's phone number, use the tag, `{{contacts:ROLE:phone}}`.


3 Inside the tag, the capitalized word specifies the custom information you'll enter. **Replace the capitalized word with the corresponding details from your account:**

- **Replace "ROLE" with the role of the *Contact*** whose information you wish to autofill in the message. For example, to autofill an Attorney contacts phone number, use the tag, `{{contacts:Attorney:phone}}`.

- **Replace "NAME OF CHECKLIST" with the *Checklist Title***. For example, to autofill your entire CLOSING TIMELINE checklist, use the tag, `{{checklist:CLOSING TIMELINE}}`.

- **Replace "TASK NAME" with the *Checklist Task***. For example, to autofill the due date for your "Listing Agreement" task on the checklist titled, "Listing checklist," use the tag, `{{checklist:Listing Checklist:Listing Agreement:due date}}`.

The only special characters allowed in *Advanced Autofill Tags* are: underscores (_) , hyphens (-), and spaces ( ). If you use any special characters in the ROLE, CHECKLIST, or CHECKLIST TASK fields, you will need to **omit those special characters** when referencing them in *Advanced Autofill Tags*. For example, if the name of a checklist task you want to reference is" `Seller's Disclosure (main)` ", when you create the *Advanced Autofill Tag* for that field, name it" `Sellers Disclosure main` ".

## Advanced Contact Autofill Tags

| TAG | FIELD | EXAMPLE TO ENTER | RESULT |
|---|---|---|---|
| {{contacts:ROLE:company}} | Company | {{contacts:escrow:company}} | ABC Title |
| {{contacts:ROLE:fax}} | Fax | {{contacts:escrow:fax}} | 310-555-1212 |
| {{contacts:ROLE:role}} | Role | {{contacts:escrow:role}} | Escrow |

| TAG | FIELD | EXAMPLE TO ENTER | RESULT |
|---|---|---|---|
| {{contacts:ROLE:first name}} | First Name | {{contacts:escrow:first name}} | Charles |
| {{contacts:ROLE:name}} | Name | {{contacts:escrow:name}} | Charles Ghould |
| {{contacts:ROLE:email}} | Email | {{contacts:escrow:email}} | charles@abctitle.com |
| {{contacts:ROLE:phone}} | Phone | {{contacts:escrow:phone}} | 310-555-1263 |
| {{contacts:ROLE:transaction note}} | Transaction Note | {{contacts:escrow:transaction note}} | Out of office on Tuesdays |

### Advanced Checklist Autofill Tag

| TAG | FIELD | EXAMPLE TO ENTER | RESULT |
|---|---|---|---|
| {{checklist:NAME OF CHECKLIST}} | Entire checklist | {{checklist:Required Listing Documents Residential}} | **Required Listing Documents Residential**<br>[ ] Mold Discl.<br>[ ] HOA<br>[ ] Seller's Property Disclosure<br>[ ] Notice to Prospective Buyer *(Due: Due 1 day after Acceptance)*<br>[✓] Lead based paint (if applicable) *(checked by Jim Smith on Mar 16, 2020)* |
| {{checklist:NAME OF CHECKLIST:TASK NAME:due date}} | Due Date | {{checklist:Pending checklist:Purchase and sales agreement:due date}} | Mon, Mar 16, 2020 |

## Pipeline Pro Webinar Recording - Autofill Tags ⍰

Learn how let the system do your typing when sending notes. We'll cover how and when to set up *Autofill Tags* in your *Message Templates* so they'll be replaced with the appropriate value from the transaction whenever you use the template to send a note. We'll also go over the *Advanced Autofill Tags* feature.

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