

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.

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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

The screenshot shows the 'Note / Email' form. At the top, there are buttons for 'Add Contact', 'Merge Docs', and 'Upload Docs', along with a 'Search Docs' search bar. Below this, there's a section for 'Email this message to:' with checkboxes for 'Listing agents' and 'Staff (6)'. The 'Staff (6)' section lists several names with checkboxes. Below that is a field for 'Send to an external email address'. The 'Subject' field contains 'Your Closing is Scheduled for' and has an 'Add autofill tag' button to its right. The 'Message' field contains 'Hi' and 'Congratulations! Closing on your new home is scheduled for' and also has an 'Add autofill tag' button to its right. At the bottom, there are 'Options' for making the note private, sending a BCC, saving as a reusable template, and appending incomplete, completed, or overdue tasks. There are 'Cancel', 'Preview Message', and 'Add Note' buttons at the bottom.

From the Message Templates area

The screenshot shows the 'Email Templates' area. At the top, there's a heading 'Email Templates' and a subheading 'Create email templates so you can reuse commonly sent emails.' Below this is a button 'Add Email Template'. There's a table with columns: 'Template', 'Subject', 'Added On', and 'Shared'. The table has one row: 'Close Date Announcement', 'Your Closing is Scheduled!', 'November 18, 2021 at 12:18 p.m.', and a green checkmark. Below the table is a form for editing a template. The 'Template Name' is 'Close Date Announcement'. The 'Email Subject' is 'Your Closing is Scheduled for' and has an 'Add autofill tag' button to its right. The 'Email Body' is 'Hi' and also has an 'Add autofill tag' button to its right. At the bottom, there's a 'Share Template' dropdown set to 'Share With Everyone', and 'Cancel' and 'Save Template' buttons.

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

The screenshot shows the 'Note / Email' form with various tabs and options. The 'Autofill Tags' dropdown menu is open, displaying a list of tags. The 'close date' tag is highlighted in yellow. The form includes sections for 'Email this message to:', 'Send to an external email address', 'Subject', 'Message', and 'Options'.

Autofill Tags List:

- appraisal due date
- buyer first name
- buyer name
- close date
- commission summary
- expiration date
- key dates
- label
- list price
- listing agent first names

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.

The screenshot shows the 'Note / Email' form with the 'Autofill Tags' dropdown menu open. The 'close date' tag is selected, and its placeholder '[[close date]]' is inserted into the message body. The form includes sections for 'Subject', 'Message', and 'Options'.

Message Body:

Hi [[buyer name]]

Congratulations! Closing on your new home is scheduled for [[close date]].

- 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}}`.



The screenshot shows a message composition interface with two tabs: "Message" and "Audio Message". The "Message" tab is active. The message body contains the text: "Hi {{contacts:Lender:name}},
The attorney for {{transaction name}} can be contacted at {{contacts:ROLE:phone}}". The tag {{contacts:ROLE:phone}} is highlighted in yellow. In the top right corner, there is a button labeled "Add autofill tag". In the bottom right corner, there is a link labeled "Autofill tag help" and a link labeled "Formatting tips".

- 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
<code>{{contacts:ROLE:company}}</code>	Company	<code>{{contacts:escrow:company}}</code>	ABC Title
<code>{{contacts:ROLE:fax}}</code>	Fax	<code>{{contacts:escrow:fax}}</code>	310-555-1212
<code>{{contacts:ROLE:role}}</code>	Role	<code>{{contacts:escrow:role}}</code>	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 Gould
{{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** ☐ Mold Discl. ☐ HOA ☐ Seller's Property Disclosure ☐ Notice to Prospective Buyer *(Due: Due 1 day after Acceptance)* ☒ 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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