Autofill Tags

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Autofill Tags let Pipeline do the typing. Drop a tag into a message template and the transaction's own details fill themselves in every time you send.

Introduction

An autofill tag is a placeholder you put in a message where a real value belongs. Write "Hi, your closing on *[property address]* is set for *[close date]*" once, and every send fills in the address and date from the transaction you're sending from.

Two kinds exist. Standard tags come from a picker and cover the fields every transaction has. Advanced tags you type by hand, and they reach into the things that are specific to your account — a contact in a particular role, a checklist you named yourself.

Tags are what turn a template from a shortcut into a real time saver. Write the message once. Send it personalized every time.

How It Works

Tags pull one field each, straight from the transaction you're sending from.

Standard Tags Come From a Picker

Click [Add autofill tag] beside the **Subject** or **Body** and the full list opens. Scroll it, or start typing a field name to narrow it down. Selecting one drops the placeholder in at your cursor.

Advanced Tags You Type Yourself

Some values can't sit in a fixed list because they depend on your account — the role you call your closing attorney, the name you gave a checklist. Those use a typed tag in double curly brackets, like `{{contacts:escrow:phone}}`, where you swap the capitalized part for your own wording.

One Tag, One Field

A tag pulls a single field as it's stored. It doesn't add numbers up, combine two fields, or reformat what it finds. If you need a total, put the total in a field and tag that field.

The Data Has to Be There

A tag fills in from what's actually on the transaction. If the close date is blank, the close date tag has nothing to bring, and Pipeline tells you before the message goes out.

Optional and Custom Fields Join the List

Turn on an optional transaction field, or create a custom field, and it becomes available as its own autofill tag. You add each one individually — there's no way to insert every optional field at once.

Where Tags Work

Use them in a message template, or in a note or email you're composing on a transaction. SeeMy Templates.

Insert an Autofill Tag

Add a standard autofill tag from the picker into a template's subject or body.

Who Can Do This: Anyone added to a Paperless Pipeline account.

To insert an autofill tag:

1. Create a new message template or open an existing one to edit.
2. Place your cursor in the **Subject** or **Body** where the value should appear.
3. Click [Add autofill tag] to the right of the field.
4. Scroll the list, or type any part of the tag's name to narrow it.
5. Select the tag you want.
6. Click [Save Template].

The placeholder sits in your message and fills with the transaction's own value each time you send from the template.

Insert an Advanced Autofill Tag

Type a tag by hand to pull a contact by role, or a checklist you named yourself.

Who Can Do This: Anyone added to a Paperless Pipeline account.

To insert an advanced autofill tag:

1. Create a new message template or open an existing one to edit.

2. Place your cursor in the **Subject** or **Body** where the value should appear.

3. Type or paste the tag from the reference below, in double curly brackets.

4. Replace the capitalized word with your own wording — the contact role, checklist title, or task name exactly as it reads in your account.

5. Click [Save Template].

To autofill an attorney's phone number, for example, the tag reads `{{contacts:Attorney:phone}}`. Advanced tags accept only underscores, hyphens, and spaces as special characters — if your role or checklist name has an apostrophe or parentheses, leave those out of the tag.

Advanced Contact Autofill Tags

These pull from a contact on the transaction, matched by the **Role** you gave them. Replace `ROLE` with your own role name.

Tag	Field	Example to enter	Result
`{{contacts:ROLE:name}}`	Name	`{{contacts:escrow:name}}`	Charle
`{{contacts:ROLE:first name}}`	First Name	`{{contacts:escrow:first name}}`	Charle
`{{contacts:ROLE:company}}`	Company	`{{contacts:escrow:company}}`	ABC T
`{{contacts:ROLE:role}}`	Role	`{{contacts:escrow:role}}`	Escro
`{{contacts:ROLE:email}}`	Email	`{{contacts:escrow:email}}`	charle
`{{contacts:ROLE:phone}}`	Phone	`{{contacts:escrow:phone}}`	310-5
`{{contacts:ROLE:fax}}`	Fax	`{{contacts:escrow:fax}}`	310-5
`{{contacts:ROLE:transaction note}}`	Transaction Note	`{{contacts:escrow:transaction note}}`	Out of Tuesd

The role in the tag has to match a role actually used on your transactions. If your contacts are entered as *Escrow Officer*, a tag written for *escrow* has nothing to find.

Advanced Checklist Autofill Tags

These pull from a checklist on the transaction, matched by the checklist's own title.

Tag	Field	Example to enter
`{{checklist:NAME OF CHECKLIST}}`	The entire checklist	`{{checklist:Required Listing Doc`
`{{checklist:NAME OF CHECKLIST:TASK NAME:due date}}`	One task's due date	`{{checklist:Pending checklist:Pu`

The whole-checklist tag prints every task on it, with completed ones marked and their due dates alongside. Pipeline matches checklist and task names exactly, so *Pending Checklist* and *Pending Checklist Condo* are two different things to a tag.

Autofill Tags FAQ

Standard tags come from a picker, advanced tags are typed by hand, and every tag pulls one field from the transaction you're sending from. Answers to the common questions about which tags exist, calculations, and tags for fields you added yourself. See Autofill Tags FAQ.

Autofill Tags Troubleshooting

Running into a problem? Start here.

- Why Isn't My Autofill Tag Filling In?