

My Templates

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Save a message you send often, then reuse it in a couple of clicks the next time a transaction needs it.

Introduction

Message templates are the messages you send over and over, saved once and kept in your own profile. The welcome note to a new client, the reminder that a document is missing, the "we're clear to close" email — write each one a single time and it's waiting for you the next time a transaction needs it.

Templates are personal. Every template belongs to the person who created it, lives in that person's profile, and is theirs to edit or delete. If you want your office sending the same message, you share yours rather than building a copy in everyone's account.

Pair a template with Autofill Tags and Pipeline finishes the job for you, dropping the property address, the agent's name, or the close date straight into the message from whichever transaction you're sending from.

How It Works

Your templates live in one place, belong to you, and can be built either from scratch or from a message you were already writing.

Where Your Templates Live

Click [Gear] in the upper-right corner, then [My Info]. Under **Message Templates** in the left menu, click [My Templates] to see everything you've saved.

Templates Belong to Their Creator

Only the person who created a template can edit, schedule, or delete it. Even a master admin can't manage someone else's templates — they can use one that's been shared with them, but the owner is the only one who can change it.

Two Ways to Build One

Create a template from scratch on your *My Templates* page, or save a message you're already composing on a transaction as a reusable template on the way out.

Autofill Tags Do the Typing

Templates and tags are made for each other. Write the message once, tag the parts that change, and each send comes out personalized. See [Autofill Tags](#).

Use One on a Transaction

When you compose a note or email on a transaction, pick your template from the saved message template list and the subject and body fill in. Start typing a few letters of the template's name to narrow a long list fast.

If Someone Leaves

Because templates travel with their owner, a deactivated profile takes its templates out of reach. Move them to another person before the profile goes away, or ask us to transfer them afterward.

Add a Message Template

Build a reusable message from scratch on your *My Templates* page.

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

To add a message template:

1. Click [Gear] in the upper-right corner, then [My Info].
2. Click [My Templates] under **Message Templates** in the left menu.
3. Click [+ Add Message Template].
4. Enter a **Template Name**.
5. Enter an **Email Subject** and **Email Body**. Add autofill tags anywhere you want transaction details filled in for you.
6. Click [Save Template].

Pipeline saves your template to *My Templates*, ready to pick the next time you send a note or email from a transaction.

Save a Message You're Composing as a Template

Turn a message you're already writing on a transaction into a template you can reuse.

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

To save a message you're composing as a template:

1. Compose your note or email on the transaction.
2. From the **Options** area, check [Save this message as a reusable template].
3. Name your template.
4. Click [Add Note] or [Send Email].

The message goes out as usual, and Pipeline saves a copy to *My Templates* under the name you gave it.

Edit a Message Template

Change the name, subject, or body of a template you created.

Who Can Do This: The person who created the template.

To edit a message template:

1. Click [Gear] in the upper-right corner, then [My Info].
2. Click [My Templates] under **Message Templates** in the left menu.
3. Click the template you'd like to change.
4. Make your changes.
5. Click [Save Template].

The updated template applies to every message you send from it going forward.

Delete a Message Template

Remove a template you no longer use from your collection.

Who Can Do This: The person who created the template.

To delete a message template:

1. Click [Gear] in the upper-right corner, then [My Info].
2. Click [My Templates] under **Message Templates** in the left menu.
3. Click the gear to the right of the template you'd like to remove, then click [Delete].
4. Click [delete] to confirm.

The template comes off your list. Messages you already sent from it are untouched.

Request a Template Transfer to Another User

Ask us to move templates from one person's profile to another when someone changes roles or leaves.

Who Can Do This: A master admin.

To request a template transfer:

1. Email help@paperlesspipeline.com from your Pipeline login email.
2. Tell us the login email address of the person the templates are coming from.
3. Tell us the login email address of the person they're going to.
4. Tell us which templates to move — name them, or say all of them.

Our team makes the move for you. Transferred templates keep their share settings, and the new owner can edit, share, and schedule them from that point on. Ownership moves in full, so the original owner no longer has access to them.

Hand a Template to the Office

Built one everybody should have? You don't have to send it round and ask each person to save their own copy.

One admin can write a message once and hand it to the whole office. That's what sharing a message template does.

See [Shared Templates](#)

Start From One That's Already Written

Before writing a message from scratch, it's worth seeing what Pipeline already ships for that stage of a deal.

The Message Template Library is a shelf of ready-made messages for every stage of a deal. Browse it, copy what fits, and make it your own.

See [Template Library](#)

My Templates FAQ

Message templates belong to the person who created them, live under *My Info*, and can be shared but not co-owned. Answers to the common questions about editing someone else's template, what happens when a profile is deactivated, and getting a copy out of Pipeline. See [My Templates FAQ](#).

My Templates Troubleshooting

Running into a problem? Start here.

- [Message Templates Are Missing, Blank, or Out of Date](#)
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