Write One Template That Fills In Each Deal's Details

Last Modified on 09/04/2026 11:12 am EDT

Write the email once, with blanks where the deal's details go, and let Pipeline fill them in. The address, the dates, the lender's phone number — typed by the system, not by you.

Introduction

Most of what an admin types in a day has already been typed once. The property address is on the transaction. The close date is on the checklist. The escrow officer's email is in the contacts. Retyping them into an email is copying your own data by hand.

Autofill tags are the placeholders that stop that. You build the message once, drop a tag wherever a detail belongs, and every time you send from a transaction those tags resolve to that transaction's own values. The part worth learning is the second tier: the advanced tags that reach past the transaction's own fields into your contacts and your checklists, which is where most of the details people actually want to send live.

When to Use This

- You send the same status email every week and retype the same five details each time.
- Your intro email needs the lender's or escrow officer's contact details and there's no tag for them.
- You're entering the same date twice — once on the checklist and again in the email.
- A coordinator sends on behalf of several agents and each message needs the right agent's name.
- You put a tag in your signature and it came out as literal text.

1. Start the Template From Your Own Profile

Templates live in your personal profile — go to your Email Templates and add one. Give it a name you'll recognize in the picker, write the message, and leave the details for the tags.

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

See My Templates

2. Drop In the Basic Tags for the Transaction's Own Data

Anything Pipeline already knows about the transaction has a tag: the transaction name, the list and sale prices, the total commission, the agents' names, and the key dates — acceptance, close, expiration, listing.

Write the sentence the way you'd say it and put the tag where the value goes. Formatting works too, so a template can carry headings and bold rather than arriving as a wall of text.

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.

See Autofill Tags

> Not every field has a tag — escrow amount is one that doesn't. Before you build a template around a value, send yourself a test from a real transaction and confirm it resolves. A tag with no match comes through as text, which is easy to miss until a client sees it.

3. Reach the Lender, Escrow, and Attorney With Advanced Contact Tags

This is the step that changes what a template can do. There is no plain tag for "the lender's phone number," and that's the wall most people hit. Advanced contact tags get past it by pulling from the transaction's contacts *by role* — so a tag can mean "whoever is the escrow officer on this deal," and resolve differently on every transaction.

They come in pieces rather than one blob: name, email, and phone are separate tags, so you can lay a contact block out however your office writes it. There's one condition, and it's the whole trick — the person has to be on the transaction as a contact, with the role you're tagging. No contact, no value.

A Contact Role says what someone does on the transaction — buyer, lender, escrow officer, attorney. Type a new one once and Pipeline offers it back to you the next time.

See Contact Roles

> Two people in the same role — co-buyers, say — both come through, in alphabetical order. It's also how you handle a trust or an entity: add the authorized signer as a contact under the buyer or seller role, and the tag writes their name into the letter.

4. Pull a Custom Date Straight Off the Checklist

If your office tracks a date that Pipeline doesn't have a field for — a disclosure deadline, a verification date — add it as a custom date field on the checklist template. Advanced checklist tags then reach it from a message.

That closes the double-entry loop: the coordinator enters the date once, on the checklist where it drives the deadline, and the same value writes itself into every email that mentions it. Nobody types it twice and the two can't disagree.

Mark a task as a key date and its deadline flows onto coversheets, calendars, and your emails.

See Key Dates

5. Know Where Tags Don't Reach

Tags run in the body of a message. They don't run in the Email Signature field on your profile — put one there and it arrives as literal text.

If you want a signature that fills itself in, build it as a message template instead and add it to the messages that need it, then clear the profile signature so you don't send two. It's the same move a coordinator makes when they send for several agents: keep your own details in the signature and put the dynamic part, the agent's name, in the body where a tag can do the work.

Every email you send from Pipeline signs off for you. Set your own signature and it's your name, your contact details, and your look at the bottom of each one.

See Email Signatures

> Template formatting is Markdown, which is why extra blank space between items won't hold. Separate a label from its value with a colon or a dash rather than fighting the spacing.