

Create & Manage Reusable Message Templates

SUMMARY

Learn how to create and manage reusable *Message Templates*.

IN THIS ARTICLE

[Introduction](#)

[Video](#) 

[Who Can Do This?](#)

[How To](#)

[Create a Message Template When Sending a Message](#)

[Manage Message Templates Outside of Transactions](#)

[Navigate to the Message Templates Area](#)

[Create a Message Template](#)

[Share a Message Template](#)

[Edit a Message Template](#)

[Delete a Message Template](#)

[Use a Saved or Shared Message Template](#)

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Introduction

Message Templates help you save time by allowing you to save and reuse messages you send frequently. To maximize your time savings, pair *Message Templates* with *Autofill Tags* to allow Pipeline to automatically insert specified information from each transaction and do the typing for you.

Video

 :56

Who Can Do This?

All Pipeline users can create and use *Message Templates*. Only admins can share *Message Templates*.

How To

Create a Message Template When Sending a Message

When sending a message from a transaction, you'll have the option to save it as a *Message Template* to reuse later.

To save a message you're composing:

- 1 **Compose your note or email.** [Learn how to Compose a Note or Email →](#)

We strongly recommend using autofill tags in your message template to let Pipeline do the typing for you and automatically insert information from the transaction. [Learn how to Use Autofill Tags →](#)

- 2 Before you send your note or email, from the Options area, select **"Save this message as a reusable template,"** and name your template.

3 Click [Add Note] or [Send Email].

Manage Message Templates Outside of Transactions

Navigate to the Message Templates Area

To navigate to the *Message Templates* area:

- 1 Click your name in the upper-right corner of Pipeline, then [Personal Profile].
- 2 From the left menu of your Personal Profile, click [Email Templates].

Create a Message Template

To create a *Message Template* from the *Message Templates* area:

- 1 Navigate to the *Message Templates* area.
- 2 Click [+ Add Email Template].

Template	Subject	Added On	Shared
Introduction to Client	It's nice to meet you!	May 27, 2021 at 4:54 p.m.	✓
Missing Signatures	Missing Signatures for {{transaction name}}	February 5, 2021 at 9:47 a.m.	⊗

3 Enter a *Template Name*.

The screenshot shows the 'Email Templates' interface. At the top, it says 'Create email templates so you can reuse commonly sent emails.' Below this is a '+ Add Email Template' button. The form has three main sections: 'Template Name' with the value 'Close Date Announcement', 'Email Subject' with the placeholder 'Enter email subject', and 'Email Body' with the placeholder 'Enter email body text'. Each section has an 'Add autofill tag' dropdown. At the bottom left, there is a 'Share Template' dropdown set to 'Do Not Share'. At the bottom right, there are 'Cancel' and 'Save Template' buttons. A red arrow points to the 'Template Name' field.

4 Enter an *Email Subject* and *Email Body*.

This screenshot shows the same 'Email Templates' form as above, but with the 'Email Subject' and 'Email Body' fields filled. The 'Email Subject' is 'Your Closing is Scheduled!' and the 'Email Body' is 'Hi {{buyer name}},
Congratulations! Closing on your new home is scheduled for {{close date}}.'. Red arrows point to these two fields. The 'Share Template' dropdown is still 'Do Not Share' and the 'Save Template' button is visible.

We strongly recommend using autofill tags in your message template to let Pipeline do the typing for you and automatically insert information from the transaction. [Learn how to Use Autofill Tags →](#)

5 To share an email template with other users on your account, [select your desired share settings](#).

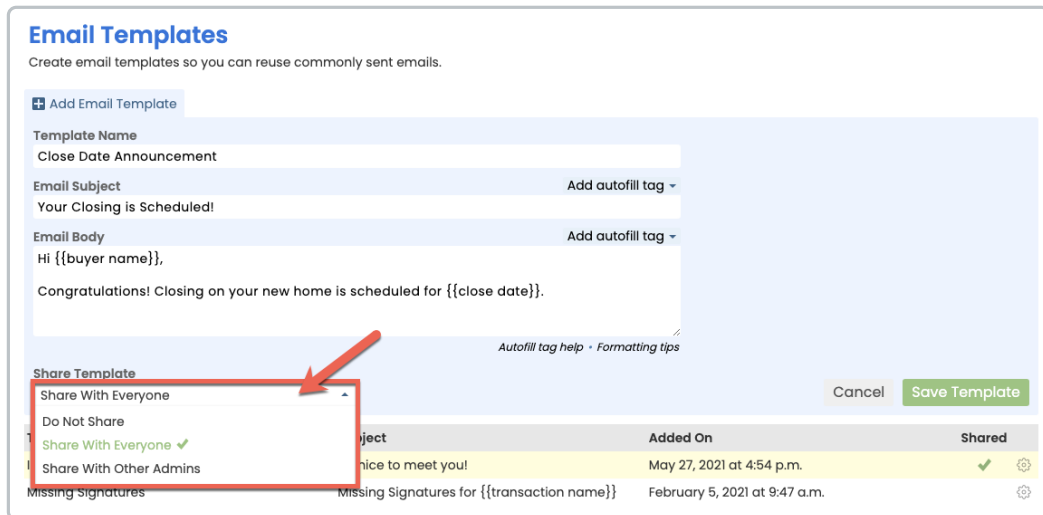
6 Click [Save Template].

Share a Message Template

Admins can share *Message Templates* with other admins or with everyone in their Pipeline account. When shared, the specified *Message Templates* will be able to be seen and used by whomever they are shared with.

To share a *Message Template*:

- 1 Navigate to the **Message Templates** area.
- 2 Click the template you'd like to share.
- 3 From the *Share Template* drop down menu at the bottom of the template, **select your desired share setting**. To share with other admins, select [Share With Other Admins] or to share with everyone, select [Share With Everyone].



- 4 Click [Save Template].

Edit a Message Template

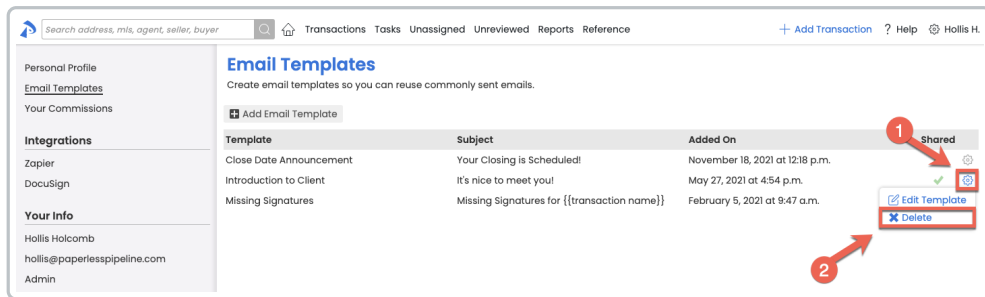
To edit a *Message Template* you previously created:

- 1 Navigate to the **Message Templates** area.
- 2 Click the template you'd like to edit.
- 3 Make your desired changes.
- 4 Click [Save Template].

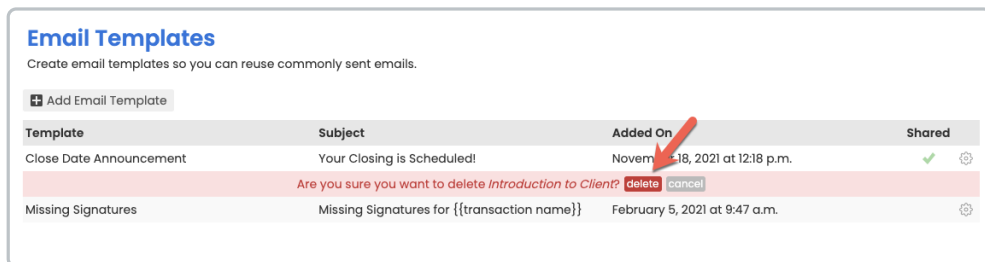
Delete a Message Template

To delete a *Message Template* you previously created:

- 1 Navigate to the **Message Templates** area.
- 2 Click the gear next to the template you'd like to delete, then select [Delete].

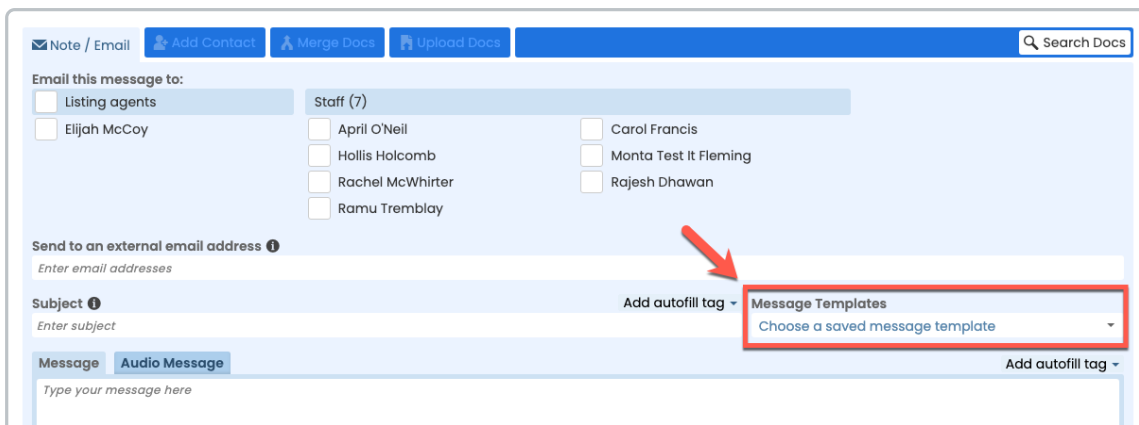


3 Click [delete] to confirm.



Use a Saved or Shared Message Template

If you previously created any *Message Templates* or if an admin has shared any *Message Templates* with you, when you're sending an email from the transaction, use the saved or shared template to instantly populate the subject and message fields with your saved or shared template. [Learn how to Use a Message Template →](#)



Pipeline Pro Webinar Recording - Be Bold! Format messages to look the way you want 📧

Come learn the various formatting options that can help add emphasis, clarity, and readability to your messages in Pipeline. We'll also reveal an upcoming formatting option for tasks that can help improve your workflow.

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