

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' interface. At the top, there are buttons for 'Add Contact', 'Merge Docs', and 'Upload Docs', along with a 'Search Docs' search bar. Below this, there are sections for 'Email this message to:' (listing agents and staff) and 'Send to an external email address:'. The 'Subject' field contains 'Your Closing is Scheduled for' and has a dropdown menu with 'Add autofill tag' highlighted by a red arrow. To the right of the subject field is a 'Message Templates' dropdown menu with 'Close Date Announcement' selected and another 'Add autofill tag' button highlighted by a red arrow. The 'Message' field contains the text 'Hi' and 'Congratulations! Closing on your new home is scheduled for'. At the bottom, there are 'Options' for privacy and task appending, and buttons for 'Cancel', 'Preview Message', and 'Add Note'.

From the Message Templates area

The screenshot shows the 'Email Templates' management area. It includes a table with columns for 'Template', 'Subject', 'Added On', and 'Shared'. Below the table, there is a form to edit a template. The 'Email Subject' field contains 'Your Closing is Scheduled for' and has a dropdown menu with 'Add autofill tag' highlighted by a red arrow. The 'Email Body' field contains the text 'Hi' and also has a dropdown menu with 'Add autofill tag' highlighted by a red arrow. At the bottom, there is a 'Share Template' dropdown menu set to 'Share With Everyone' and buttons for 'Cancel' and 'Save Template'.

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

Note / Email Add Contact Merge Docs Upload Docs Search Docs

Email this message to:

Listing agents Staff (6)

Elijah McCoy Carol Francis Hollis Holcomb

Monty Test It Fleming Rachel McWhirter

Rajesh Dhawan Ramu Tremblay

Send to an external email address ⓘ

Enter email addresses

Subject ⓘ Add autofill tag Message Templates

Your Closing is Scheduled for Close Date Announcement

Message Audio Message

Hi

Congratulations! Closing on your new home is scheduled for

Options

Make this note private (in Notes & Sent Emails below)

Append **incomplete** tasks to message

Send me a BCC (blind copy) of the message

Append **completed** tasks to message

Save this message as a reusable template

Append **overdue** tasks to message

Cancel Preview Message Add Note

Choose an autofill tag:

- 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.

Subject ⓘ Add autofill tag Message Templates

Your Closing is Scheduled for **{{close date}}**! Close Date Announcement

Message Audio Message Add autofill tag

Hi **{{buyer name}}**

Congratulations! Closing on your new home is scheduled for **{{close date}}**!

Autofill tag help · Formatting tips

- 6 When your message template is complete, click **[Save Template]**.

Use Advanced Autofill Tags

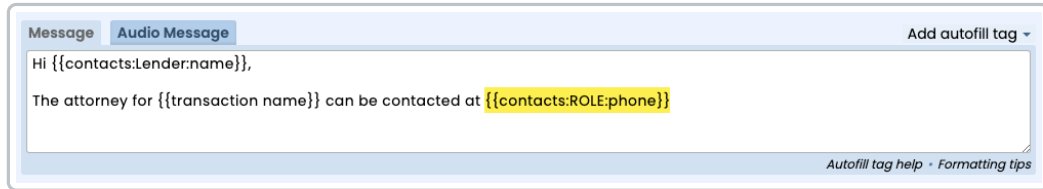
Advanced Autofill Tags are additional *Autofill Tags* that do not appear in the *Autofill Tags* drop down menu because they contain custom information from your account. These advanced tags allow you to automatically insert specified contact information, checklists, and task due dates.

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](#) →

- 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}}`.



- 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
<code>{{contacts:ROLE:first name}}</code>	First Name	<code>{{contacts:escrow:first name}}</code>	Charles

TAG	FIELD	EXAMPLE TO ENTER	RESULT
{{contacts:ROLE:name}}	Name	{{contacts:escrow:name}}	Charles
{{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}}	<p>**Required Listing Documents Residential**</p> <p><input type="checkbox"/> Mold Discl.</p> <p><input type="checkbox"/> HOA</p> <p><input type="checkbox"/> Seller's Property Disclosure</p> <p><input type="checkbox"/> Notice to Prospective Buyer</p> <p>*(Due: Due 1 day after Acceptance)*</p> <p><input checked="" type="checkbox"/> Lead based paint (if applicable) *(checked by Jim Smith on Mar 16, 2020)*</p>
{{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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Pipeline Pro Webinar Recording - Advanced Checklist & Contact Autofill Tags 📄

Since there were a number of questions related to the checklist *Autofill Tag* portion of last week's webinar, this week we'll dive deeper into how to utilize those *Autofill Tags* in messages.

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