Schedule Messages Using Message Templates

Learn how to automatically generate scheduled messages based on transaction dates being met or checklist tasks being completed.

Introduction

Communication is crucial, so sending messages at the right time can make all the difference. Set your *Message Templates* to automatically generate scheduled messages based on transaction dates being met or checklist tasks being completed.

Once the milestone you specify has been met on a transaction, you'll be notified via email that a message has been generated for that transaction, and that it's waiting for you to review and send in your *Scheduled Messages* queue.

 $\sqrt{2}$ or can also draft messages directly from transactions to be automatically sent at a later time. Learn how \rightarrow

Who Can Do This?

All Pipeline users can set their own *Message Templates* to automatically generate scheduled messages.

Set Up a Scheduled Message

Schedule a Message Relative To A Transaction Date

Schedule messages to be generated relative to a date on a transaction. Whenever the date rule you set for the template is met on a transaction, Pipeline will automatically generate a message.

For example, if you schedule a message to be generated 2 calendar days after a transaction's *Listing Date*, and the *Listing Date* for 123 Main Street is April 1st, a message will be generated for 123 Main Street on April 3rd.

To schedule a message to be generated relative to a date on a transaction:

1 Add or edit an existing *Message Template*. Learn how to Create & Manage Reusable Message

Templates \rightarrow

2 Click [Schedule Template] at the bottom of the *Message Template*.

3 Set the date rule for sending the message in the On Date area, then click [Set Date Rule].

Message Templates Create message templates so you can reu	se commonly sent emails		
Add Message Template			
Template	Subject	Added On	Scheduled Shared
Formatting		October 7, 2021 at 9:24 p.m.	✓ 4
ntro to Seller	Congrats, {{contacts:seller:first name	ə}}! March 2, 2023 at 2:28 p.m.	√
Template Name Intro to Seller			
Email Subject Congrats, {{contacts:seller:first name}]	1		Add autofill tag
If you have any questions along the wa		{{listing date}}. We look forward to taking this friends at Paperless Real Estate.	Add autofill tag journey with you. Autofill tag help Formatting tip
Share Template Share With Everyone	•		
Schedule Message ① On date: Due 2 Calendar Days -	When task is completed:	To recipient(s):
after 👻 Listing Date 👻 Set Date Rule		Click to Select Transaction Roles Click to Select	
		Email Addresses Enter email addresses	
Hide Schedule			Cancel Save Template

4 **Choose your desired recipients** in the *To Recipient(s)* area.

🗄 Add Message Template			
emplate	Subject	Added On	Scheduled Shared
ormatting	Subject	October 7, 2021 at 9:24 p.m.	
ntro to Seller	Congrats, {{contacts:seller:first name}}		
Template Name Intro to Seller			
Email Subject Congrats, {{contacts:seller:first name}}	}ı		Add autofill tag -
Email Body Hi {{contacts:seller:first name}},			Add autofill tag -
Congratulations! Your house was officio	ally listed with Paperless Real Estate on {{li	sting date}}. We look forward to taking th	nis journey with you.
,		•	nis journey with you.
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If you have any questions along the war Share Template Share With Everyone Schedule Message ① United States Due 2 Calendar Days * after * Listing Date *	y, please don't hesitate to contact your fri	To recipien Contact Roles Seller X Transaction Roles Listing Agents X	Autofill tag heip Formatting tip
If you have any questions along the war Share Template Share With Everyone Schedule Message ① United States Due 2 Calendar Days * after * Listing Date *	y, please don't hesitate to contact your fri	Transaction Roles	Autofili tag help Formatting tip

⁵ Click [Save Template]. Whenever a transaction meets the specified date rule, you will receive a notification email the following morning (at 5am EST) informing you that a message has been scheduled along with a link to the *Scheduled Messages* page.

Schedule a Message When a Task is Completed

Schedule a message to be generated when a specific task has been completed on a transaction. Whenever the task gets marked as fully complete on a transaction, Pipeline will automatically generate a message.

For example, if you schedule a template to be generated when your Listing Agreement task is completed, and the Listing Agreement task gets marked as fully complete on 123 Main Street, a message will be generated for 123 Main Street.

To schedule a message to be generated when a task has been completed on a transaction:

1 Add or edit an existing *Message Template*. Learn how to Create & Manage Reusable Message Templates →

2 Click [Schedule Template] at the bottom of the *Message Template*.

³ From the When Task is Completed Area, select the task you would like to trigger a message to be sent.

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Personal Profile	Message Templa			
Your Commissions	Create message templates so y	ou can reuse commonly sent emails.		
Message Templates	Add Message Template			
Manage Templates	Template	Subject	Added On	Scheduled Shared
Scheduled Messages	Formatting		October 7, 2021 at 9:24 p.m.	 O
	Intro to Seller	Congrats, {{contacts:seller:first nam	ne}}! March 2, 2023 at 2:28 p.m.	
Integrations	Template Name			
Zapier	Intro to Seller			
Dropbox Sign	Email Subject			Add autofill tag -
DocuSign	Congrats, {{contacts:seller:fi	rst name}}!		
Your Info	Email Body			Add autofill tag -
Hollis Holcomb	Hi {{contacts:seller:first name	41.		
hollis+prod@paperlesspipeline.co	com Congratulations! Your house	was officially listed with Paperless Real Estate on	{{listing date}}. We look forward to taking this	journey with you.
Transaction Manager	If you have any questions alo	ng the way, please don't hesitate to contact you	r friends at Paperless Real Estate.	
				Autofill tag help Formatting tips
Your Permissions	Share Template			
	entare rempiate			
Master Admin (account-wide,	Share With Everyone	•		
Master Admin (account-wide, unlimited access ())		•		
	Share With Everyone	When task is completed:	To recipient(a):
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unlimited access ())	Schedule Message ① On date: Due Calendar Days	When task is completed:	To recipient(Contact Roles Click to Select	a);
unlimited access ()) Legal Stuff Terms of Service	Share With Everyone Schedule Message On date: Due Calendar Days after Close Date	Choose a checklist	Contact Roles Click to Select	s):
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4 **Choose your desired recipients** from the To Recipient(s) area.

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ro to Seller	Congrats, {{contacts:seller:first name)}}! March 2, 2023 at 2:28 p.m.	✓
mplate Name			
ntro to Seller			
nail Subject			Add autofill tag
Congrats, {{contacts:seller:first n	ame}}!		
nail Body			Add autofill tag
i {{contacts:seller:first name}},			
nare Template hare With Everyone	•		
shedule Message 🕦			
On date:	When task is completed:	To recipient(s):
	Choose a checklist	Contact Roles	
Due 2 Calendar Days		seller ×	
		Transaction Roles	
after 👻 Listing Date		Transaction Roles	
after 👻 Listing Date			

⁵ Click [Save Template]. Whenever the selected task is marked as complete on a transaction, you will receive a notification email the following morning (at 5am EST) informing you that a message has been scheduled along with a link to the *Scheduled Messages* page.

New scheduled messages awaiting your action	04/02/2023 D	Sun, Apr 2, StOOAM (1 day ago) 🚖 🕤
to me 🛩		
	Here scheduled messages awaiting your action 04/02/2023 Marce scheduled messages were triggered today and are awaiting your review	

View Your Scheduled Messages Queue

Admin & Support

To view your Scheduled Messages queue:



2 Click [Scheduled Messages] from the left menu. On the Scheduled Messages queue, you'll be shown a list of your scheduled messages awaiting your review.

From here, you can preview, edit, send or delete scheduled messages.

earch address, mis, agent, seller, buyer	Transactions Tasks Unassigned Unreview	wed Reports Reference			+ Add	Transaction ?
Personal Profile Your Commissions	Scheduled Messages view	r message templates →				
Message Templates	Subject	Recipients	Scheduled	Transaction	Actions	
Manage Templates	Schedule a Message on Close Date	No recipients found.	Mar 24, 2023 🚺	March 2023 Testing	700	
Scheduled Messages	Schedule a Message on Close Date	No recipients found.	Mar 24, 2023 🚺	😑 🙂 One Main Street, Dall	700	
w.	Schedule a Message on Close Date	hollis+max@paperlesspipeline.com	Apr 2, 2023 🕕	123 Third Street	701	
Integrations	Schedule a Message on Close Date	hollis+geoffrey@paperlesspipeline.com	Apr 2, 2023 🕕	12 Pluto Dr	701	
Zapier						
Dropbox Sign						
DocuSign						

Preview a Scheduled Message

To preview a scheduled message:

1 Go to your Scheduled Messages queue.

2 Click the name of the message you want to preview or the eye icon You will be shown a preview of the message to be sent along with any errors found.

Search address, mis, agent,	seller, buyer	Transactions Tasks Unassigned U	Inreviewed Reports Reference			+ Add Transaction ? Help 🐵 Hollis
	Personal Profile	Scheduled Messages	View message templates			
	Your Commissions	Bulk 👻				
	Message Templates	Subject	Recipients	Scheduled	Transaction	Actions
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	Integrations	Subject Schedule a Message on Close D	oate			
	Zapier	Body				
	Dropbox Sign	Errors Found				
	DocuSign	{{ checklistlisting }} is not an ave	silable message tag.			
	Your Info	{{ checklistlisting:listing agreem	ent:due date }} is not an available message tag.			
	Hollis Holcomb	{{contacts:Escrow:fax}} has not t	seen added to the transaction and will be blank.			
	hollis@paperlesspipeline.com ZXYU	{{contacts:Escrow:transaction no	ote}} has not been added to the transaction and wi	ill be blank.		
	2210	##Autofill Tags				•
	Your Permissions	**acceptance date:** March 9, **added by:** Kristian Keane	2023			
	Master Admin (account-wide, unlimited access ())	**added on:** September 29, 20 **agent first names:** Newish, J				
	Legal Stuff	Recipients				
	Terms of Service	Errors Found				
	Privacy Policy	Recipient with role "a little dog" h	as not been added to this transaction.			
	Billing Policy					
		Template Name: Schedule a Mes	sage on Close Date			
		Scheduled: on Close				
		Edit Message			Cancel So	ave Changes
		Schedule a Message on Close Date	hollis+max@paperlesspipeline.com	Apr 2, 2023 🚺	123 Third Street	701
		Schedule a Message on Close Date	hollis+geoffrey@paperlesspipeline.com	Apr 2, 2023 🚺	12 Pluto Dr	400

Edit a Scheduled Message

To edit a scheduled message:



2 Click the name of the message you want toedit.

3 Scroll down to the bottom of the message, and click [Edit Message].

4 Make your desired changes to the *Subject*, *Message Body* and/or *Recipients*.

Search address, mls, agent, seller, bu	iyer 🔾 🟠 Transactions To	isks Unassigned Unreviewed Reports Reference		+ Add Transaction ? Help	(0) Hol
Personal Profile	Scheduled Messag	CS View message templates →			
Your Commissions	Bulk 👻				
Message Templates	Subject	Recipients	Scheduled	Transaction	Actio
Manage Templates	Schedule a Message on Close	Date hollis@paperlesspipeline.com	Mar 24, 2023 🌗	March 2023 Testing	
Scheduled Messages	Subject Schedule a Message on Clo	se Date			
Integrations	Body				
Zapier Dropbox Sign DocuSign	##Autofill Tags **acceptance date:** April **added by:** Kyn Holco **added on:** March 20, 20 **agent first names:** Kynd	23			
Your Info	Recipients				
Hollis Holcomb	Errors Found				
hollis@paperlesspipeline.com ZXYU	Recipient with role "a little do	g" has not been added to this transaction.			
LATO .	hollis@paperlesspipeline.com	n			
Your Permissions	Enter email addresses				
Master Admin (account-wide, unlimited access ())	Template Name: Schedule a	Message on Close Date			
	Scheduled: on Close				
Legal Stuff	-				
Terms of Service				Cancel Save C	

5 Click [Save Changes].

Send a Scheduled Message

To send a scheduled message:

1 Go to your Scheduled Messages queue.

2 Click the name of the message you want to send to expand it and review its contents.

3 Click the [Send icon] next to the message you want to send.

Search address, mls, agent, seller, buyer	Q 🏠 Transactions Tasks Unas	signed Unreviewed Reports Reference		+ Add Transaction	? Help 🚷 Hollis H.
Personal Profile Your Commissions	Scheduled Messages View	v message templates →			
Message Templates	Subject Schedule a Message on Close Date	Recipients hollis@paperlesspipeline.com	Scheduled Mar 24, 2023 ()	Transaction March 2023 Testing	Actions

Delete a Scheduled Message

To delete a scheduled message:

1 Go to your Scheduled Messages queue.

2 Click the [trash can icon] next to the message you want to delete.

Search address, mis, agent, sell	er, buyer 🔾 🏠 Transactions Tasks	Unassigned Unreviewed Reports Reference		+ Add Transaction ?	Help 🚷 Hollis
Personal Profile Your Commissions	Scheduled Messages	View message templates			
Message Templates	Subject	Recipients	Scheduled	Transaction	Aons
Manage Templates	Schedule a Message on Close Date	hollis@paperlesspipeline.com	Mar 24, 2023 🌘	March 2023 Testing	70

Pipeline Pro Recording: Scheduled Messaging

April 19, 2023

This week we'll cover all the glorious details related to automating both your message templates and transaction messages to ensure your recipients get the right messages when they most need them.

15:27

View more Pipeline Pro Webinars here →