

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.



You can also draft messages directly from transactions to be automatically sent at a later time. [Learn how →](#)

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 →

- 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].

The screenshot displays the 'Message Templates' interface. At the top, there is a table with columns for 'Template', 'Subject', 'Added On', 'Scheduled', and 'Shared'. The 'Intro to Seller' template is highlighted. Below the table, the template details are shown, including the name, subject, and body. A 'Schedule Message' dialog box is open, showing the 'On date' section with a 'Due' field set to '2' and a 'Calendar Days' dropdown set to 'after'. A 'Set Date Rule' button is visible. The 'When task is completed' section has a 'Choose a checklist...' dropdown. The 'To recipient(s)' section has three sections: 'Contact Roles', 'Transaction Roles', and 'Email Addresses', each with a 'Click to Select' button. At the bottom of the dialog, there are 'Hide Schedule', 'Cancel', and 'Save Template' buttons.

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

Message Templates
Create message templates so you can reuse commonly sent emails.

+ Add Message Template

Template	Subject	Added On	Scheduled	Shared
Formatting		October 7, 2021 at 9:24 p.m.		✓
Intro to Seller	[Congrats, {{contacts:seller:first name}}]!	March 2, 2023 at 2:28 p.m.		✓

Template Name
Intro to Seller

Email Subject
[Congrats, {{contacts:seller:first name}}]! Add autofill tag ▾

Email Body
Hi {{contacts:seller:first name}},
Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking this journey with you.
If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate. Autofill tag help Formatting tips

Share Template
Share With Everyone ▾

Schedule Message ⓘ

On date:

Due 2 Calendar Days ▾

after ▾ Listing Date ▾

Set Date Rule

When task is completed:

Choose a checklist... ▾

To recipient(s):

Contact Roles
seller X

Transaction Roles
Listing Agents X

Email Addresses
Enter email addresses

Hide Schedule Cancel Save Template

- 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.

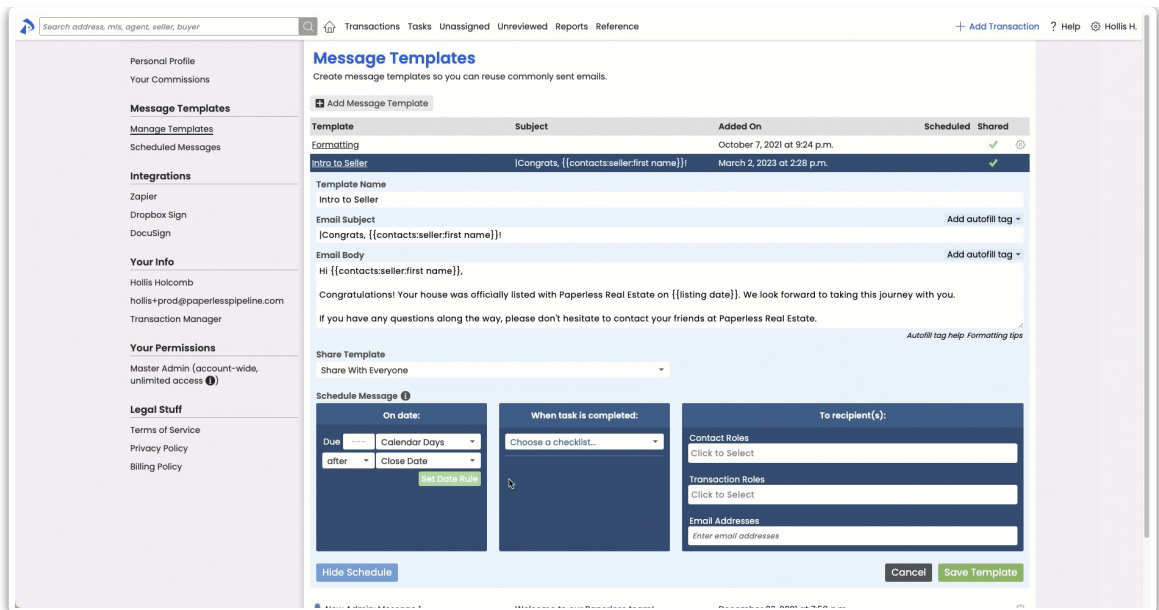
Schedule a Message When a Task is Completed

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.

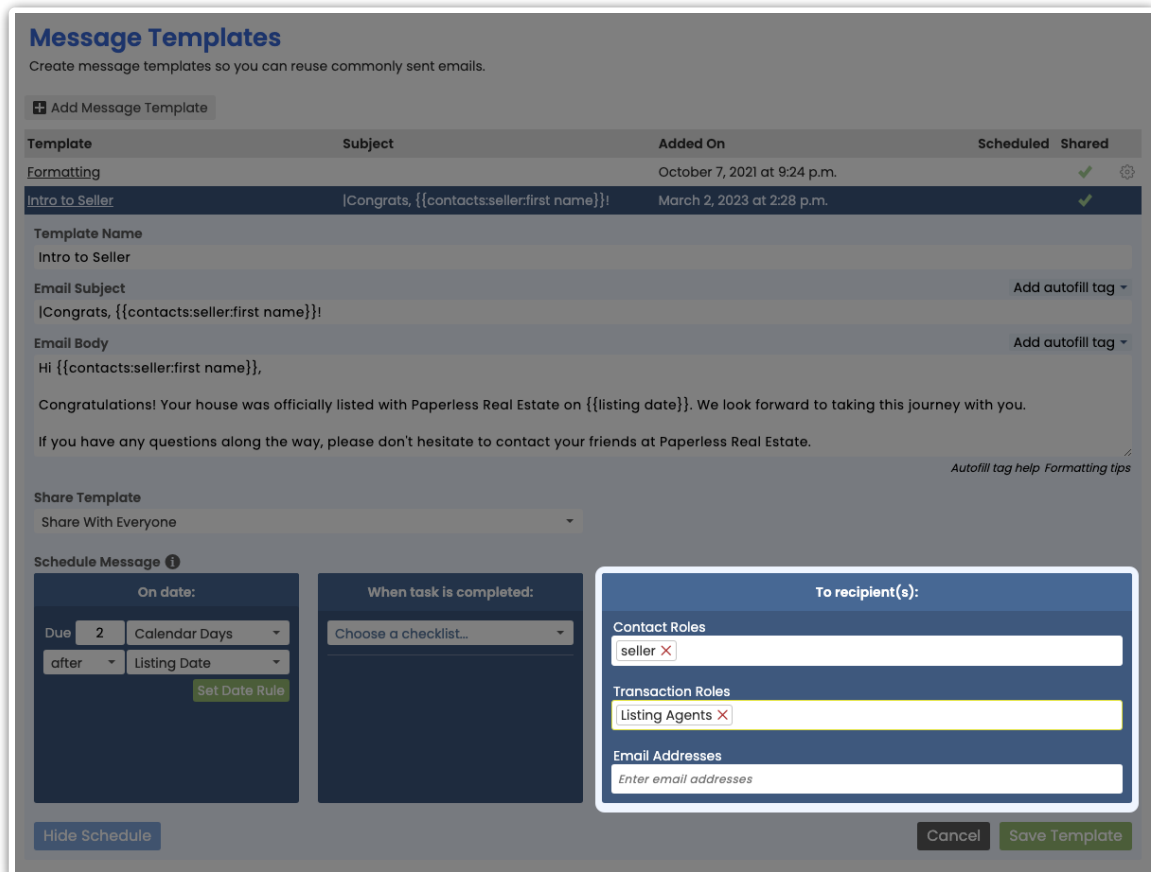
For example, if you schedule a template to be generated when your Listing Agreement task is completed, and the Listing Agreement task gets marked as fully complete on 123 Main Street, a message will be generated for 123 Main Street.

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.



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

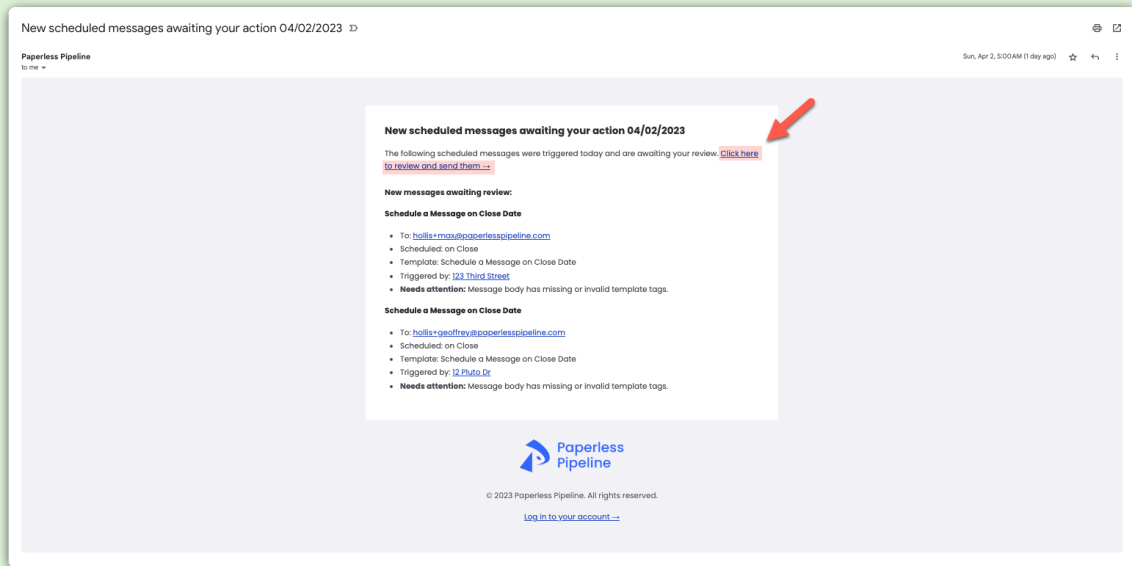


- 5 Click [Save Template]. Whenever the selected task is marked as complete on a transaction, you will receive a notification email the following morning (at 5am EST) informing you that a message has been scheduled along with a link to the *Scheduled Messages* page.

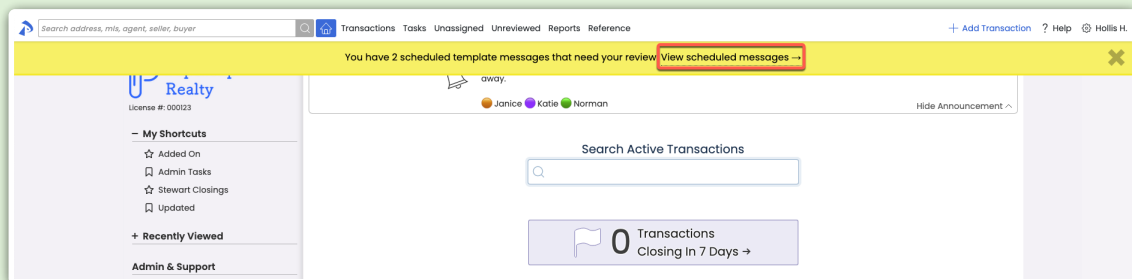
Manage Your Scheduled Message Queue



Whenever a message has been generated, you'll be alerted via email, along with a link to your *Scheduled Messages* page where you can review and send the message.



Whenever you log into Pipeline, you'll also be alerted on the *Home* Page if you have any scheduled messages awaiting your review.

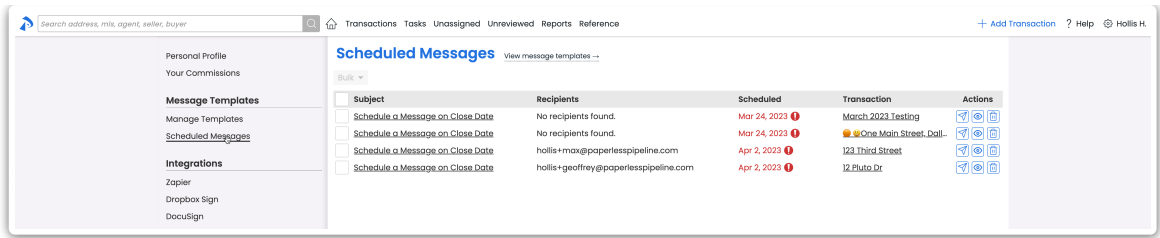


View Your Scheduled Messages Queue

To view your *Scheduled Messages* queue:

- 1 Go to your **Personal Profile** by clicking your name in the upper-right, then [Personal Profile].
- 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.

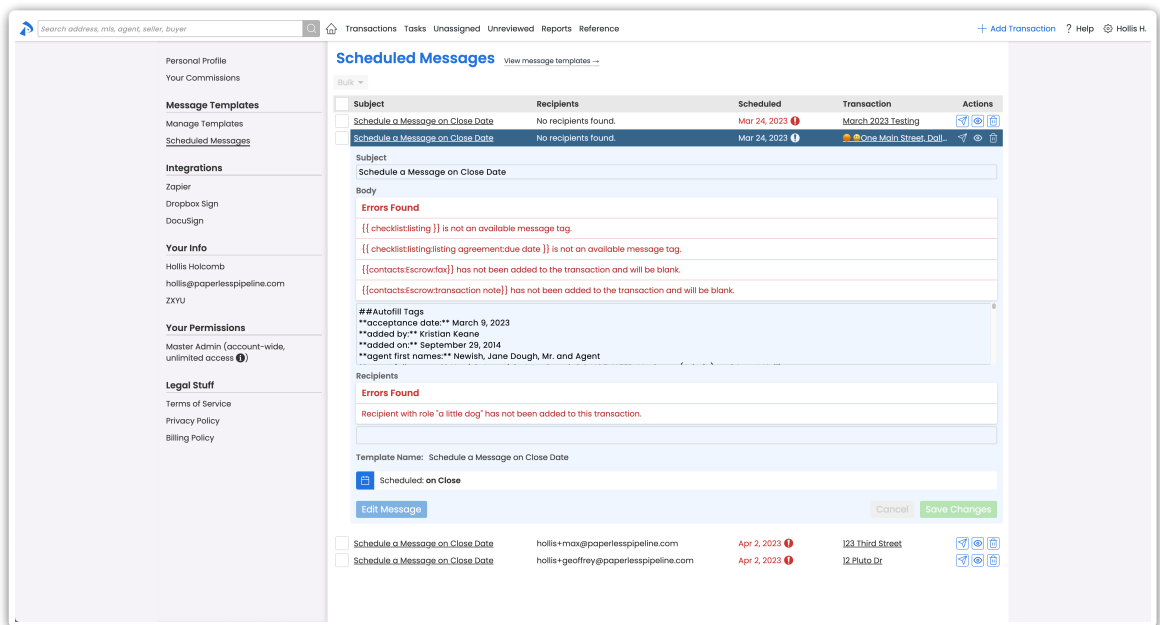
From here, you can [preview](#), [edit](#), [send](#) or [delete](#) scheduled messages.



Preview a Scheduled Message

To preview a scheduled message:

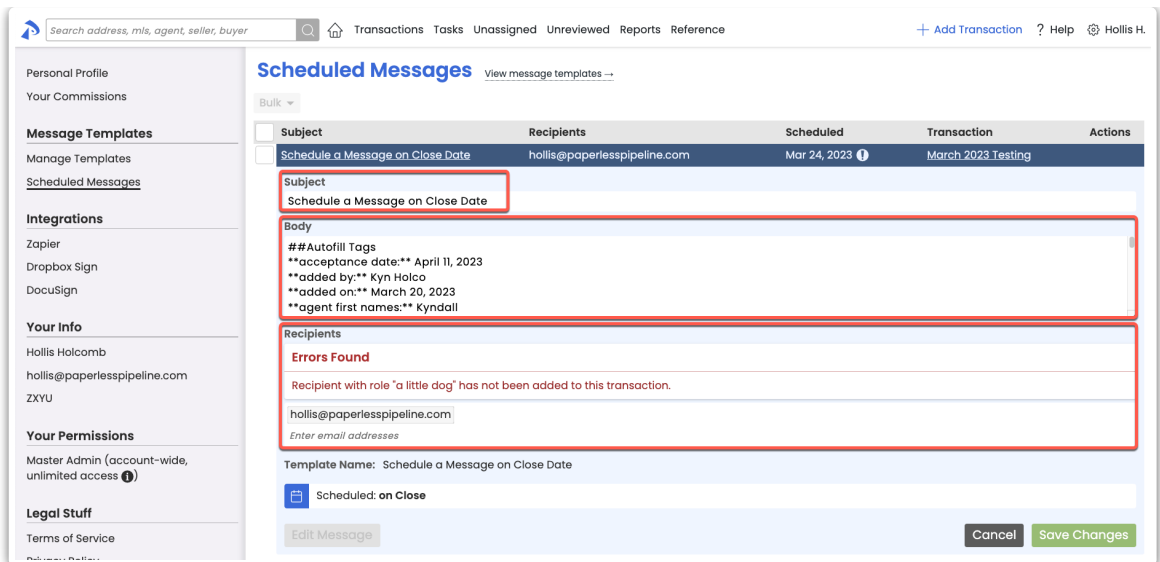
- 1 Go to your *Scheduled Messages* queue.
- 2 Click the name of the message you want to preview or the eye icon You will be shown a preview of the message to be sent along with any errors found.



Edit a Scheduled Message

To edit a scheduled message:

- 1 Go to your *Scheduled Messages* queue.
- 2 Click the name of the message you want to edit.
- 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*.

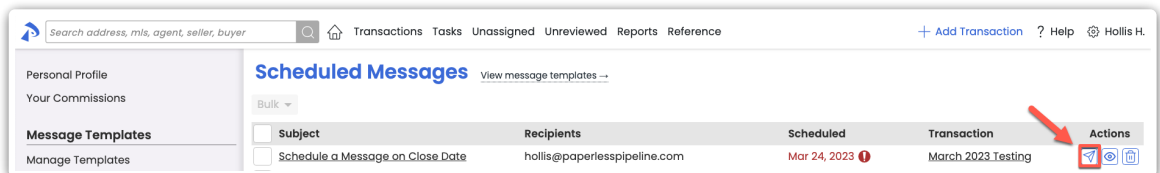


- 5 Click [Save Changes].

Send a Scheduled Message

To send a scheduled message:

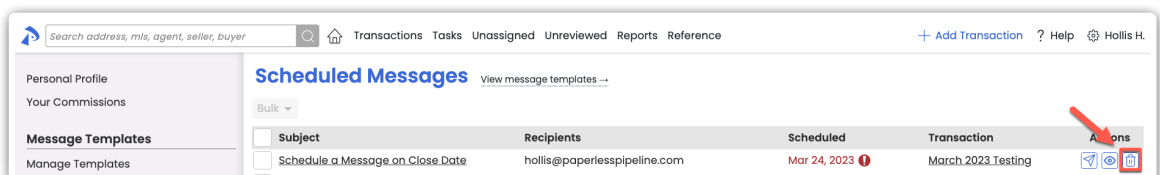
- 1 Go to your *Scheduled Messages* queue.
- 2 Click the name of the message you want to send to expand it and review its contents.
- 3 Click the [Send icon] next to the message you want to send.



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.



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 →](#)