# **Your Scheduled Emails Queue**

# Automatic Queuing

When you schedule a message template, you choose the trigger, such as a transaction date or a checklist task. Pipeline monitors your transactions in the background.

Each time a trigger is met, Pipeline generates a message and places it in your queue. You don't need to remember dates or chase down tasks.

### Managing Your Queue

When a message is generated, you get an email and a home page alert. From the queue, you can see all scheduled messages in one list.

At that point you choose what to do:

- Preview the message to check it.
- Edit the subject, body, or recipients.
- Delete it if it's no longer needed.
- Send it right away if it's ready.

#### Staying in Control

The Scheduled Messages Queue gives you the best of both worlds. Automation ensures that important communications are generated on time, while the queue provides oversight so you always have the final say before anything is sent. This balance keeps your workflow efficient without sacrificing accuracy or professionalism.

# Delete a Scheduled Email

Delete messages that have been automatically generated to remove them from your queue and prevent them from being sent.

Who Can Do This: Anyone.

To delete a scheduled message:

#### Choose the Message to Delete

• View your Scheduled Messages queue to find the message you want to delete.

### **Delete the Message**

• Click [Trash] next to the message you want to delete.



# Send a Scheduled Email

Send a message that has been automatically generated once you've reviewed and approved their content.

Who Can Do This: Anyone.

To send a scheduled message:

# Choose the Message to Send

• View your Scheduled Messages queue to find the message you want to send.

### Send the Message

- Click the name of the message you want to send to expand it and review its contents.
- Click [Send] next to the message you want to send.

