

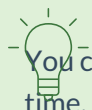
Schedule Messages Using Message Templates

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].

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}}]

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

[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.

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}}!

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.

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.

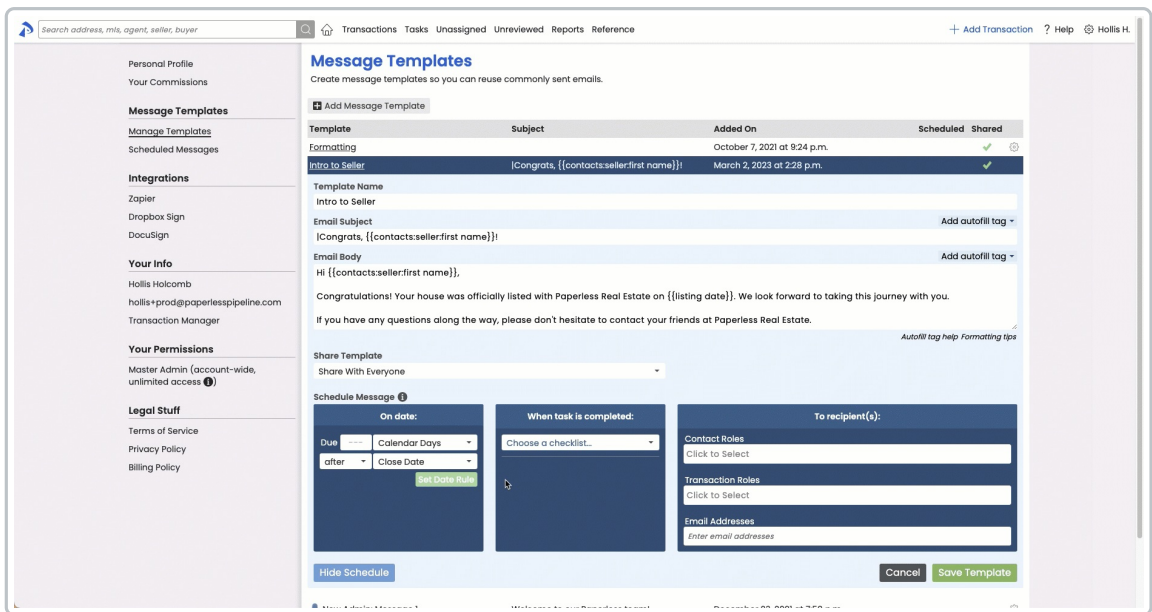
Schedule a Message When a Task is Completed

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.

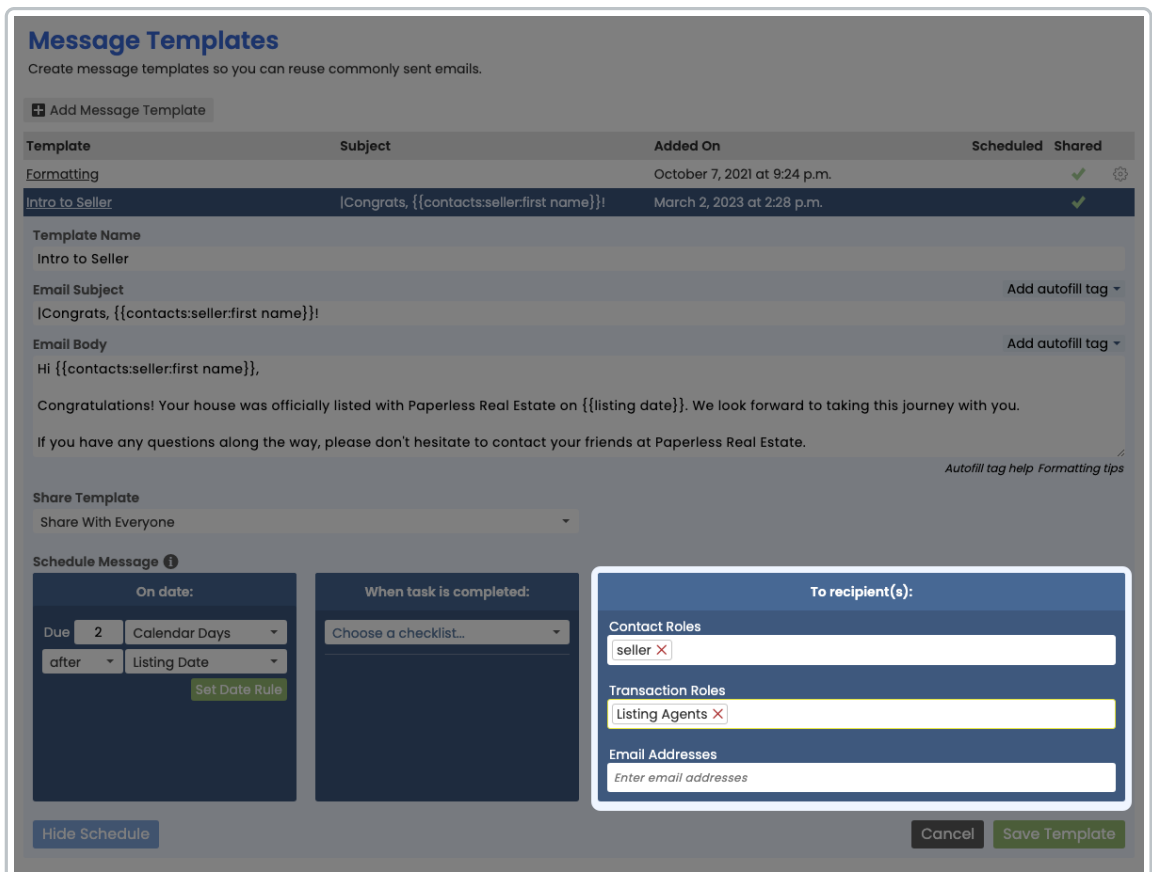
For example, if you schedule a template to be generated when your Listing Agreement task is completed, and the Listing Agreement task gets marked as fully complete on 123 Main Street, a message will be generated for 123 Main Street.

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.

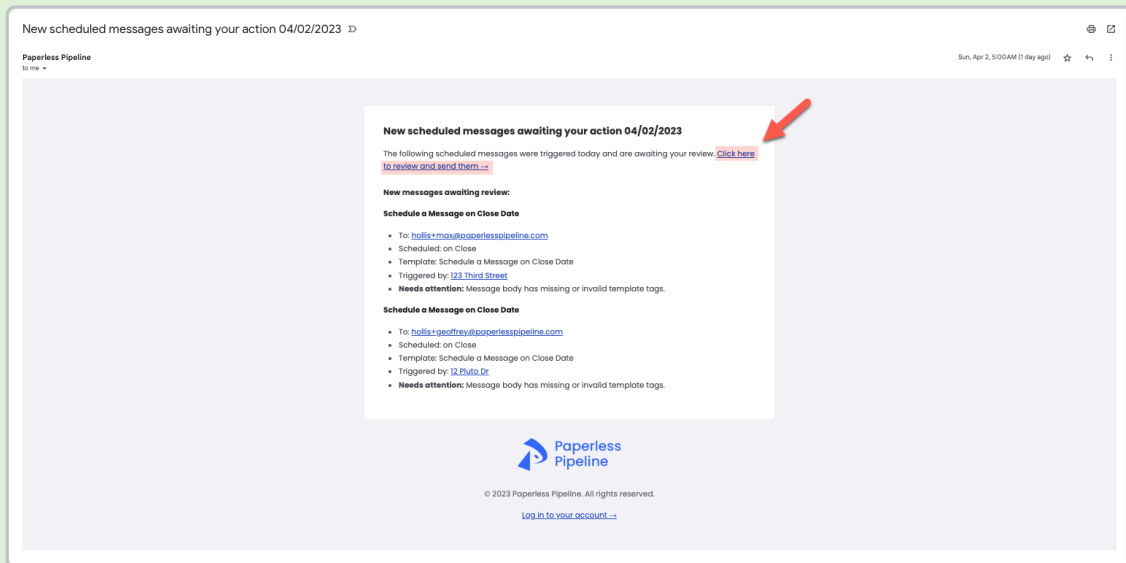


- 5 Click **[Save Template]**. Whenever the selected task is marked as complete on a transaction, you will receive a notification email the following morning (at 5am EST) informing you that a message has been scheduled along with a link to the *Scheduled Messages* page.

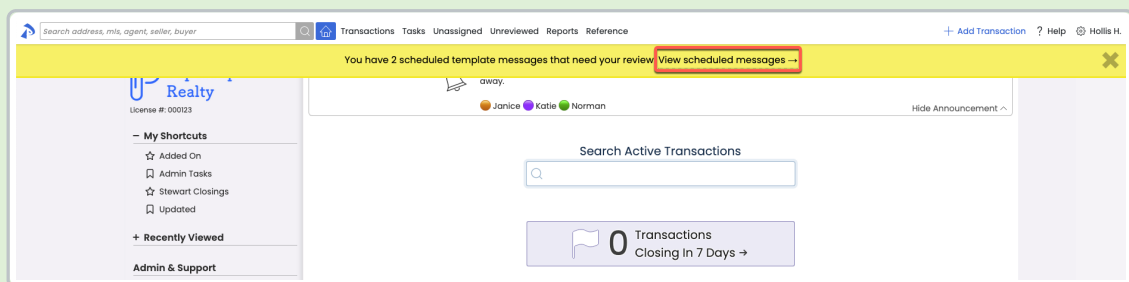
Manage Your Scheduled Message Queue



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.

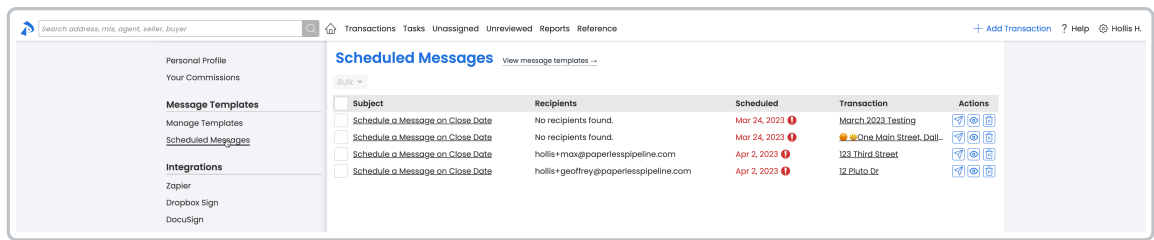


View Your Scheduled Messages Queue

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.

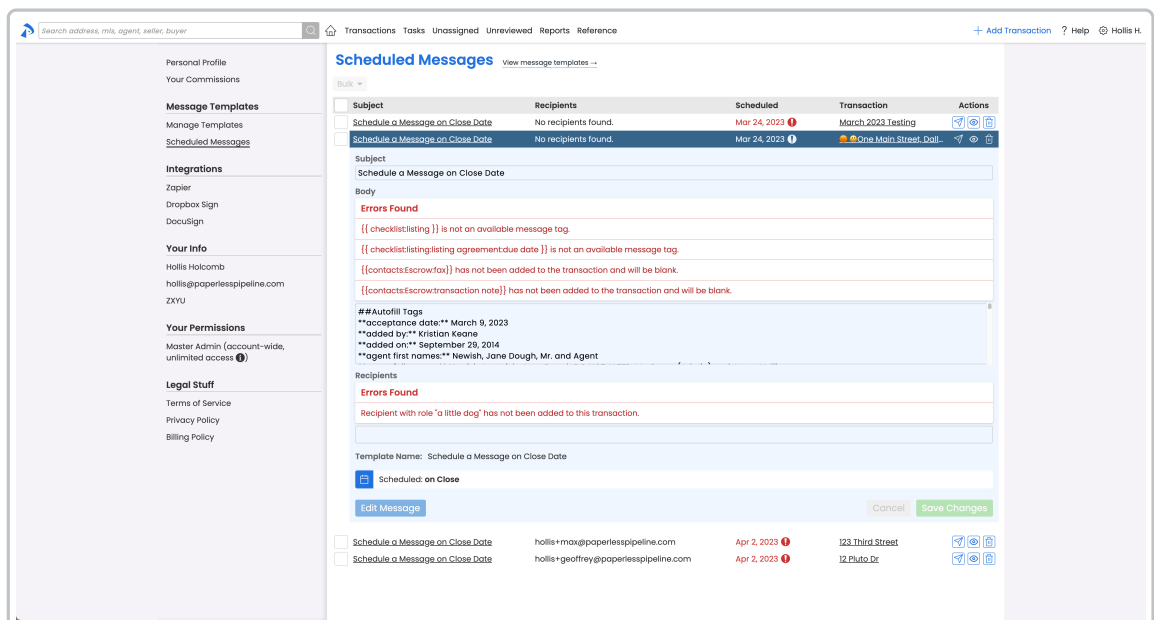
From here, you can [preview](#), [edit](#), [send](#) or [delete](#) scheduled messages.



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*.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

Scheduled Messages View message templates -->

Bulk ▾

Subject	Recipients	Scheduled	Transaction	Actions
☐ Schedule a Message on Close Date	hollis@paperlesspipeline.com	Mar 24, 2023	March 2023 Testing	

Subject
Schedule a Message on Close Date

Body
##Autofill Tags
acceptance date: April 11, 2023
added by: Kyn Holco
added on: March 20, 2023
agent first names: Kyndall

Recipients
Errors Found
Recipient with role "a little dog" has not been added to this transaction.
hollis@paperlesspipeline.com
Enter email addresses

Template Name: Schedule a Message on Close Date

☐ Scheduled: on Close

Edit Message Cancel Save Changes

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

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

Scheduled Messages View message templates -->

Bulk ▾

Subject	Recipients	Scheduled	Transaction	Actions
☐ Schedule a Message on Close Date	hollis@paperlesspipeline.com	Mar 24, 2023	March 2023 Testing	

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, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

Scheduled Messages View message templates -->

Bulk ▾

Subject	Recipients	Scheduled	Transaction	Actions
☐ Schedule a Message on Close Date	hollis@paperlesspipeline.com	Mar 24, 2023	March 2023 Testing	

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 →](#)
