Message Scheduling FAQ

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A schedule is a trigger plus a recipient list, and where you set it decides what you get. Answers to the common questions about triggers, recipients, send times, and what a schedule can't do.

Can I schedule a Message Template to send on a specific calendar date?

No — a template only takes rules relative to a date on the transaction. An absolute date would eventually come due for every transaction in your account at once, so it isn't offered. When you need an exact date, schedule the message from inside the transaction instead.

Can someone else schedule a Message Template I created?

No. Only the template's owner can schedule it.Sharing a template lets other admins apply it while they're composing a message — it doesn't let them see, edit, schedule, or delete it. That's deliberate: it keeps two people from queuing the same message to the same recipients.

Which transactions will a scheduled template reach?

The ones its owner can see. A template owned by a master admin can queue across every transaction in the account; one owned by an agent only reaches the transactions they have access to.

Who can a scheduled message be sent to?

Transaction Roles, Contact Roles, or email addresses you type in.Transaction Roles route by position on the file — Listing Agents, Buying Agents, Listing Assistants, Buying Assistants. Contact Roles route to whoever holds a role like Buyer or Seller on each transaction. Typed addresses let you reach people who aren't in Pipeline at all, like a title company or an outside accountant.

Can I attach a document to a scheduled message?

Only when you schedule from a transaction. There you compose the whole message first, attachments included, and Pipeline sends it as-is. A message generated by a template schedule can't carry attachments.

What times can a scheduled message go out?

One of six fixed times, all Eastern: 9am, 10am, 12pm, 2pm, 4pm, or 6pm. Every account runs on Eastern time, so if your office sits in another zone, count the difference back to your own clock — there's still no way to put a schedule on your local time. If that's costing you, tell us at help@paperlesspipeline.com; that feedback is what moves it up the list.

If the same task is on two checklists, will one scheduled template cover both?

No. The schedule is tied to that task on that one Checklist Template. To trigger the same message from a matching task on a second checklist, set up a second scheduled template pointed at that checklist.

Can a scheduled message be triggered by a document upload?

Not today. Triggers are transaction dates and task completion. If a document arriving is the moment you care about, the usual workaround is a checklist task for that document — checking it off fires the schedule.

Can a scheduled message be triggered by a transaction's status changing?

Not directly. A status change isn't one of the triggers. Most offices get close by scheduling off the date that moves with the status — Acceptance Date for a pending file, Close Date for a closed one — or off the checklist task their team completes at that moment.

Learn More

Set a message to send itself later — on a date the transaction supplies, when a task gets checked off, or at a time you pick.

See Message Scheduling

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.