Message Scheduling

Last Modified on 11/10/2026 12:26 pm EST

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.

Introduction

The message you need to send is one you already know how to write. What you don't know yet is the date, because it depends on a deal that hasn't got there. So you end up writing it in the moment anyway, for the fourth time this month.

Scheduling separates the writing from the sending. You set the message up now and hand Pipeline the condition it goes out on, and there are two ways to do that. Put a schedule on a Message Template and a message lines up on every transaction that meets your rule, counted from a date that transaction supplies or from a task getting checked off. Schedule from a single transaction instead and you get a one-off that sends itself at a date and time you pick.

The writing happens in a calm moment rather than a rushed one, and the same message goes out the same way every time. A schedule belongs to whoever made it, so what you set up stays with you until it goes rather than landing in somebody else's work.

How It Works

A schedule is a trigger plus a recipient list, and where you set it decides what you can use for each.

Where Do I Set the Schedule?

On a Message Template or inside a transaction. A template schedule is a standing rule that applies to every transaction in your account meeting the criteria, takes relative rules only, and can't carry attachments; it reaches only the transactions its owner can see, so a master admin's queues account-wide while an agent's stays on their own files. Sharing a template, with everyone or with admins only, lets those people apply it but not schedule it. Scheduling from a transaction is a one-off: you compose the message in full, attachments included, then pick an exact date and one of six Eastern-time delivery times.

What Sets It Off?

A date the transaction supplies, or a task getting checked off. A date rule counts forward or back from Listing Date, Acceptance Date, Close Date, Expiration Date, Transaction Creation, any optional contingency date your account has turned on, and any custom date field an admin has marked as a trigger date. It counts in calendar days or business days, and your Business Holidays apply only to the business-day methods. A task rule waits for one specific task to be marked fully complete.

Who Gets the Message?

Whoever you name on the schedule, not on the message. Pick **Transaction Roles** to route by position on the file — Listing Agents, Buying Agents, Listing Assistants, Buying Assistants — or **Contact Roles** to reach whoever holds a role like Buyer or Seller on each transaction. You can also type email addresses in directly, including people who

aren't Pipeline users at all.

Schedule a Message Template on a Transaction Date

Set a date rule on a Message Template so Pipeline lines the message up on every transaction that reaches that date.

Who Can Do This: Any Pipeline user, on Message Templates they own.

To schedule a message template on a transaction date:

1. Click the [Gear] in the upper-right corner, then [My Info]. Select [Manage Templates] from the left menu.
2. Click the template you want to schedule, or click [+Add Message Template] to build a new one.
3. Click [Schedule Template] at the bottom of the template.
4. In the *On Date* area, set the date rule — how many days before or after which transaction date — then click [Set Date Rule].
5. In the *To Recipient(s)* area, choose your recipients.
6. Click [Save Template].

From now on, whenever a transaction meets that rule, Pipeline queues a message for it and emails you the next morning with a link to your *Scheduled Messages* queue.

Schedule a Message Template on Task Completion

Set a Message Template to queue when a particular checklist task is checked off as fully complete.

Who Can Do This: Any Pipeline user, on Message Templates they own.

To schedule a message template on task completion:

1. Click the [Gear] in the upper-right corner, then [My Info]. Select [Manage Templates] from the left menu.
2. Click the template you want to schedule, or click [+Add Message Template] to build a new one.
3. Click [Schedule Template] at the bottom of the template.
4. From the *When Task is Completed* area, select the task that should trigger the message. The task you pick belongs to one Checklist Template, so the rule fires only for that checklist.
5. In the *To Recipient(s)* area, choose your recipients.
6. Click [Save Template].

Once that task is marked fully complete on a transaction, Pipeline queues the message the following morning and emails you a link to your *Scheduled Messages* queue.

Schedule a Message From a Transaction

Compose a message on the transaction, then set it to send itself at a date and time you choose.

Who Can Do This: Anyone who can send a note or email from the transaction.

To schedule a message from a transaction:

1. Open the transaction and compose your email in the *Note/Email* area, including any attachments.
2. Click [the down arrow] attached to the *Send* button.
3. Select [Schedule Send].
4. Click [Absolute Date] to pick an exact date and a delivery time, or [Relative Date] to set a rule based on a date on the transaction.
5. Click [Schedule Send].

The message appears in that transaction's *Scheduled Messages* area and sends automatically at the time you set.

Schedule From a Date That Isn't in the List Yet

The dropdown offers the dates your account has switched on, so the milestone your office really schedules around is sometimes missing from it — a feasibility deadline, a lease end date, whatever your market runs on. Adding the field is what puts it in the list.

Pick the date a deadline counts from, and Pipeline works the rest out on every transaction — for task due dates and scheduled messages alike.

See Trigger Dates

Frequently Asked Questions

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, with everyone or with admins only, lets those people 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.