Scheduled Messages Queue

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Scheduled messages wait in a queue where you can preview them, fix what's wrong, send them, or delete them before they reach anyone.

Introduction

A schedule comes due and Pipeline writes the message. Before it reaches a client, an agent, or the coordinator on the other side, it stops somewhere you can look at it.

That somewhere is the queue: a plain list of what's lined up, with what you need to check it. You can read a message before it goes, fix a line that's wrong, send it, or delete it because the deal moved and the message no longer fits. Anything the template couldn't work out on that particular transaction shows up here too, most often a recipient it couldn't resolve, so you see the problem while it's still fixable. Pipeline tells you when something arrives, by email the morning it's generated and on your *Home* page the next time you sign in.

It costs a click on each message. That's the trade the queue makes, and in exchange nothing goes out under your name that you haven't read. A scheduled message still passes a person before it reaches a real one.

How It Works

There are two places a scheduled message waits, they hold different things, and both are yours alone.

Your Scheduled Messages Queue

Your own queue lives in your personal profile, under *Scheduled Messages.* It holds the messages your Message Template schedules have generated — one entry per transaction that matched — and it's where you preview, edit, send, or delete them.

The Queue on a Transaction

A message you scheduled with [Schedule Send] while composing on a transaction waits in that transaction's own *Scheduled Messages* area instead. It's already written, so it needs nothing from you — it sends itself at the date and time you set. You can't edit a message already scheduled there; if it needs to change, delete it and schedule a new one.

The Queue Is Yours Alone

Scheduled messages are personal. No one else can see what's pending in your queue, and no one else can send it for you — not a colleague, not a master admin. There's no way to hand your queue over while you're out of the office. Once a message sends, it appears in *Notes & Sent Emails* on the transaction, where anyone with access to that transaction can read it.

Errors Show Up Before You Send

Previewing a queued message shows you the message that's going out along with any problems Pipeline found — most often a recipient the template couldn't resolve on that particular transaction. You can fix the message and send it, or send it as-is.

One Click Per Message

You send messages one at a time. There's no bulk send, deliberately: a rule wrote the queued message, not you, and it's usually headed for a client.

View Your Scheduled Messages Queue

> Open the list of messages your template schedules have generated and are holding for you.

> **Who Can Do This**: Any Pipeline user, for their own scheduled messages.

To view your scheduled messages queue:

1. Click the [Gear] in the upper-right corner, then [My Info].
2. Select [Scheduled Messages] from the left menu.

You'll see every scheduled message waiting on your review, listed with the transaction it belongs to.

Preview a Scheduled Message

> Read a queued message exactly as it will arrive, along with any errors found on it.

> **Who Can Do This**: Any Pipeline user, for their own scheduled messages.

To preview a scheduled message:

1. Go to your *Scheduled Messages* queue.
2. Click the name of the message, or the [eye icon] next to it.

The message expands to show what's going out and flags any problems — a recipient that couldn't be added, for instance — so you can fix it before sending.

Edit a Scheduled Message

Change the subject, the body, or the recipients on a queued message before it goes.

Who Can Do This: Any Pipeline user, for their own scheduled messages.

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 to the bottom of the message and click [Edit Message].
4. Make your changes to the **Subject**, **Message Body**, or **Recipients**.
5. Click [Save Changes].

Your changes apply to this one queued message. The Message Template it came from is untouched, so future messages come out the way the template has them.

Send a Scheduled Message

Release a queued message to its recipients.

Who Can Do This: Any Pipeline user, for their own scheduled messages.

To send a scheduled message:

1. Go to your *Scheduled Messages* queue.
2. Click the name of the message to expand it and read what's going out.
3. Click the [Send icon] next to the message.

The message goes out and joins *Notes & Sent Emails* on its transaction, becoming part of that transaction's record.

Delete a Scheduled Message

Clear a queued message you don't want sent — an expiration reminder on a listing that already closed, say.

Who Can Do This: Any Pipeline user, for their own scheduled messages.

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 remove.

The message comes off your queue and never goes out.

Check What Actually Went Out

Sending is the moment a message stops being yours alone. It leaves the queue and joins the transaction's own record, where anyone working that deal can read it — which is also where to look when someone asks whether the client was ever told.

Every note you add and every email you send from a transaction lands in one running log at the bottom of the page.

See Notes & Sent Emails

Scheduled Messages Queue FAQ

A queue is where a scheduled message waits, and Pipeline keeps two of them. Answers to the common questions about finding yours, who else can see it, and what you can change before a message goes. See Scheduled Messages Queue FAQ.