Send the Right Message at the Right Moment in the Deal

Last Modified on 09/04/2026 11:05 am EDT

The messages that keep a deal moving are the same ones every time. Write each one once, tell Pipeline what to wait for, and it goes out on its own — to your agents, to your clients, or to the accountant who never had a Pipeline login.

Introduction

Think about what you actually send during a transaction. A welcome note the day after it opens. A disclosure nudge a week past acceptance. The commission worksheet ten days before closing. A note to the accountant the moment funds are deposited. None of them is hard to write. They're hard to *remember*, and the one you forget is the one that costs somebody a day.

Scheduling takes the remembering off you. You save the message as a template, set a rule about when it should go, and from then on Pipeline watches every transaction in your account and lines up a copy for each one that reaches that point. The message fills itself in with that transaction's own details, and it's addressed by role. It reaches whoever is the buyer on that file, or whoever is the listing agent, without you looking anyone up.

An admin builds this once. What you get back is a deal that talks to the people on it, on schedule, whether or not anyone was watching the calendar that morning.

When to Use This

- You send the same three or four emails on every transaction and you rewrite them from scratch each time.
- An agent missed a deadline because nobody remembered to send the reminder.
- Your accountant, your outside transaction coordinator, or your closing attorney needs to know when a deal closes — and none of them is a Pipeline user.
- You want a message to reach "the buyer" without looking up who the buyer is on each file.
- You went looking for a way to set a message on a specific calendar date and couldn't find one on the template.

Why This Waits for Your Click

The instinct is that a scheduled message is a fire-and-forget thing: set the rule, walk away, and Pipeline mails your clients on its own forever. It doesn't work that way, and the reason is worth knowing before you build anything. A message generated by a template was written by a *rule*, not by you — the rule doesn't know that this particular listing fell through last Tuesday, or that this particular seller is already annoyed. So Pipeline builds the message, drops it in your queue, emails you that it's there, and stops.

That's a feature, and it changes how you plan. Each queued message is sent with its own click, so scheduling gives you a reliable *draft* on every deal rather than a mail-merge you can't take back. Build your morning around reading the queue and clearing it, and the rest of the workflow does exactly what you wanted.

1. Write the Message as a Template

Nothing can be scheduled until it exists as a template, so start there — one template per message, named for the moment it belongs to rather than for the person it goes to. A template you own is a template you can schedule; sharing one lets other admins *use* it while composing, but the schedule stays with the owner.

Save a message you send often, then reuse it in a couple of clicks the next time a transaction needs it.

See [My Templates]

> One template can't change its wording depending on which side of the deal you're on. If your listing-side and buying-side versions differ, write two templates and schedule each against the side it belongs to.

2. Let the Transaction Fill In the Details

A scheduled message is generic until the transaction fills it in. Drop tags where the specifics go — the property address, the closing date, the agent's name — and every copy that queues comes out addressed to the right deal without anyone typing it.

Autofill Tags let Pipeline do the typing. Drop a tag into a message template and the transaction's own details fill themselves in every time you send.

See [Autofill Tags]

3. Pick What the Message Waits For

This is the step that decides everything else. A template's rule is *relative* — so many days before or after a date the transaction already carries, or the moment a specific task is checked off as fully complete. Thirty days after Close for the follow-up. Three days after Acceptance for the disclosure nudge. On completion of *Funds Deposited* for the note to the accountant.

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]

> A task trigger belongs to one checklist template. If the same task name lives on two checklists, the rule only fires for the one you picked — the other needs its own scheduled template.

> A template can't be aimed at a fixed calendar date, because that date would eventually arrive for every transaction at once. When you need an exact date, schedule the message from inside the transaction instead. And nothing can fire on the day a transaction is created — the earliest dependable rule off creation is one calendar day after.

4. Add the Date Your Office Actually Counts From

If the moment you want to send from isn't one of the dates Pipeline ships — a feasibility deadline, a lease end date, a compliance cutoff — you don't have to settle for the nearest one. Put the milestone on your transactions as its own date field, mark it as a trigger date, and your message schedules can count from it exactly like they count from Close.

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

5. Point It at the People Who Need It

Recipients live on the schedule, not on the message, and you have three ways to name them. **Transaction Roles** route by position on the file — Listing Agents, Buying Agents, and their assistants — so the message reaches whoever is working that deal. **Contact Roles** route by who someone is to the transaction, so a message aimed at the Buyer finds a different person on every file without you maintaining a list. And you can type an email address in directly, which is how a non-user gets looped in: the accountant who cuts the checks, the outside coordinator, the insurance office that needs to know a deal went hard.

A Contact Role says what someone does on the transaction — buyer, lender, escrow officer, attorney. Type a new one once and Pipeline offers it back to you the next time.

See Contact Roles

6. Send It From the Queue

Once a day, early, Pipeline reads your schedules, finds the transactions that now qualify, and generates one message for each. You get an email the next morning with a link, and an alert on your Home page when something's waiting. Read them, fix anything the rule couldn't know about, delete the ones that shouldn't go, and send the rest.

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

See Scheduled Messages Queue

> A date rule fires on the date whatever the transaction's status is by then, so a listing that closed or fell through before its expiration date will still generate its reminder. Clearing those out of the queue is worth a line on your close-out checklist. Messages also go one at a time — there's no bulk send, deliberately.

7. Find It Later on the Transaction

Once a queued message goes out it stops being an automation and becomes part of the file. It lands in the transaction's own history with everything else you've sent, which is what makes this safe to lean on: six months later, the record of what the client was told and when is on the deal, not in somebody's sent folder.

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