Send the Right Message at the Right Moment in the Deal

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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.

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 the person it goes to.

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

See My Templates

2. Put It on a Schedule

The rule, the recipients by role, and the review queue are one setup.Put Your Transaction Emails on a Schedule walks through it end to end, along with the one-off message you schedule from inside a single transaction.

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

3. Clear the Queue Each Morning

Every scheduled message waits for your click before it goes, so the queue is the part that becomes a habit. Read what arrived, fix anything the rule couldn't know about, 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