Put Your Transaction Emails on a Schedule

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Write the message once and hand Pipeline the moment it goes out: a set number of days before a transaction date, the morning a task is checked off, or a date and time you pick. Two methods, one for standing rules and one for one-offs.

Introduction

The reminder to the buyer three days before inspection, the check-in the day after acceptance, the note to title the week of closing. You know the words. What changes is the date, because it depends on a deal that has not got there yet, so you end up writing each one in the moment, or keeping a task on the checklist whose only job is to remind you to send it.

Scheduling separates the writing from the sending, and Pipeline offers it two ways. Put a schedule on a message template and it becomes a standing rule: every transaction you can see that meets the rule gets a message queued for your review, with the recipients chosen by their role on the deal. Schedule a message from inside one transaction and it is a one-off that sends itself at the time you set, attachments and all, with no review step.

The first method is for the messages your office sends on every deal. The second is for the message you have just written and want to leave the building at nine tomorrow instead of eleven tonight.

When to Use This

- You keep checklist tasks whose only purpose is to remind you to send an email.
- The same message goes out at the same point on every deal, and sometimes it does not.
- You write messages late and would rather they arrive during business hours.
- You want a client reminder to fire when a task is checked off, not when someone remembers.
- You set up a scheduled template, and now messages appear in a queue and you are not sure why they did not just send.

1. Pick the Method Before You Build

A template schedule is a rule that applies across every transaction its owner can see, so a master admin's rule reaches the whole account and an agent's reaches only their files. It takes relative rules only, cannot carry attachments, and every message it generates waits in your queue for a look before it goes. A message scheduled from a transaction is written in full, attachments included, and sends itself at the date and time you set with nobody reviewing it, because you just wrote it. The schedule belongs to the template's owner: share the template and other admins can send it by hand, but the rule stays with you. A template can't be aimed at a fixed calendar date either, because that date would arrive for every transaction at once, so an exact date is a job for the one-off method.

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

2. Schedule a Template on a Transaction Date

Under [Gear] → [My Info] → [Manage Templates], open the template and click [Schedule Template]. In the On Date area, set the rule: how many days before or after which date. The dates on offer are Listing Date, Acceptance Date, Close Date, Expiration Date, any optional contingency date your account has turned on, and any custom date field an admin has marked as a trigger date. Choose calendar days or business days, and business days skip your company's holidays. Click [Set Date Rule].

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

When the date you schedule around is not in the list, an inspection deadline or a lease end, turn on the optional field or build a custom date field and mark it as a trigger date. It joins the list.

3. Or Schedule It on a Task Being Checked Off

In the same Schedule Template area, the When Task is Completed option lists the tasks on your checklist templates. Pick one, and the message queues the morning after that task is marked fully complete on a transaction. The rule is tied to that task on that one checklist template, so a task that appears on two checklists needs two scheduled templates. A rule is a date or a task, not both.

4. Name the Recipients by Role

The recipients live on the schedule, not in the message. Choose Transaction Roles to route by position on the file, Listing Agents, Buying Agents, Listing Assistants, Buying Assistants, or Contact Roles to reach whoever holds Buyer, Seller, Lender, or any role you use on each transaction. You can also type an email address for someone outside Pipeline, such as a title company. Name at least one recipient and save the template.

A role that does not exist on a given transaction is the usual reason a queued message shows an error. A template aimed at both Listing Agents and Buying Agents flags one on every deal where your office represents one side. The queue shows you that before anything sends.

One template can't change its wording by side. If your listing-side and buying-side versions differ, write two templates and aim each one at the roles for its side.

5. Work the Queue Each Morning

Pipeline checks every transaction against your rules overnight. When one matches, it writes the message the following morning, emails you a link, and flags the waiting messages on your Home page the next time you sign in. The queue itself is under [Gear] → [My Info] → [Scheduled Messages].

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

Click a message's name or the [eye icon] to read it as it will arrive, with the template and trigger that produced it and any error found. Click [Edit Message] to change the subject, body, or recipients on that one message without touching the template. Click the [Send icon] to release it, or the [trash can icon] when the deal has moved on and the

message no longer fits. Each message is one click, on purpose, and the queue is yours alone: nobody else can see it or send from it, so plan for absences.

The review is there because a rule can't know what happened on the file. A date rule fires on its date whatever the transaction's status is by then, so a listing that closed or fell through before its expiration date still queues its reminder. Clearing those out is worth a line on your close-out checklist. Once you send a message it becomes part of the deal, in Notes & Sent Emails with everything else sent from the transaction.

If a message is missing a recipient or a tag value, fix the transaction, then edit and save the queued message and it refreshes.

6. Schedule a One-Off From the Transaction

Compose the email in the Note / Email area, attachments included, then click the [down arrow] next to Send and choose [Schedule Send]. Pick [Absolute Date] for an exact day and one of six delivery times, 9am, 10am, 12pm, 2pm, 4pm, or 6pm, all Eastern, or [Relative Date] for a rule such as two calendar days after the acceptance date. Click [Schedule Send].

The message waits in that transaction's own Scheduled Messages area, where you can preview it, send it now, or delete it, and it sends itself when the time comes. It cannot be edited once scheduled. If a date in the message might move, write it as an autofill tag, because the tag pulls the transaction's current value at send time.

7. Start With the Two That Pay First

The buyer check-in the day after acceptance and the inspection reminder three business days before the inspection date are the usual first two template schedules, because each one used to be a task. The recipes for those templates, and the rest of a coordinator's weekly set, are in Build the Message Templates Your Office Sends Every Week.

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

See My Templates