# Build the Message Templates Your Office Sends Every Week

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Ten templates that cover most of what a transaction coordinator sends, each one written once and filled in by the transaction: the seller intro, the buyer check-in with key dates, the inspector reminder, the pre-closing confirmation, the closing package, and more.

## Introduction

The messages that go out on a deal are mostly the same messages, deal after deal. The welcome to the seller. The check-in to the buyer once the offer is accepted, with the dates they need to know. The reminder that the inspection is Thursday and here is the inspector's number. The note to the agent before closing asking them to confirm the details. The closing package.

Each of those can be a message template with autofill tags in place of the specifics, so the seller's name, the listing date, the inspector's phone, and the whole milestone checklist come from the transaction you are sending from. A template is a personal thing, but an admin can share one with the office, and an agent can build their own. The mechanics of tags are covered elsewhere. This guide is the set of templates worth building, and what each one pulls in.

Start with one message you were about to send anyway. Once it works, the second takes five minutes, and a few weeks later most of your outgoing mail is a template and a click.

## When to Use This

- You retype the same five details into the same welcome, check-in, or reminder email on every deal.
- Buyers ask what happens next and you answer one at a time.
- Agents ask for a copy of their contacts or their documents when a deal closes.
- One admin's messages read better than everyone else's, and you want the office sending theirs.
- You have heard about scheduled messages and want templates that are ready to schedule.

## 1. Save the Message You Were About to Send Anyway

The fastest template is a message you are already writing. Before you click send, check [Save this message as a reusable template], give it a name, and send. Then open the template under [Gear] → [My Info] and swap every specific for a tag: the seller's name for the seller first name tag, the date for the listing date tag, your own name for the sender first name tag. That last one matters once a template is shared, because whoever sends it signs it.

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

See My Templates

How tags work, standard and advanced, and the rules for what a tag can and cannot reach, is inWrite One Template That Fills In Each Deal's Details.

## 2. Name Them So the Picker Sorts Them

The template picker narrows as you type, so the name is the filing system. One pattern that holds up: the recipient first, then the purpose. Seller - Intro. Buyer - Check-in and Key Dates. Agent - Pre-closing Confirmation. Some offices number them so they run in deal order, and some prefix them by location or department. Any pattern works if the whole office uses it, and once a template is shared it appears in everyone's picker below their own.

One admin can write a message once and hand it to the whole office. That's what sharing a message template does.

See Shared Templates

## 3. Welcome the Seller, Then Check In With the Buyer

The seller intro needs three tags: seller first name, listing date, and sender first name. The buyer check-in after acceptance uses buyer first name, the buying agent's name, and the {{key dates}} tag, which drops in every task flagged as a key date on the transaction with its due date and whether it is done. Flag the earnest money deadline, the inspection period, the loan approval date, and the closing on the checklist template once, and every buyer check-in carries them.

Mark a task as a key date and its deadline flows onto coversheets, calendars, and your emails.

See Key Dates

## 4. Share a Whole Checklist, or One Due Date

When the buyer should see the full milestone list rather than the key dates alone, use the checklist tag: {{checklist:Milestones}}, with your checklist's exact title in place of Milestones. It prints every task, marks the completed ones, and shows the due dates. For a single date, such as the appraisal deadline, use {{checklist:Milestones:Appraisal Due:due date}} with the task's exact name. Names have to match what is on the transaction to the letter.

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

## 5. Put the Inspector's Details in the Reminder

The inspection reminder to the seller pulls the inspection date from the transaction and the inspector from the contacts: {{contacts:Inspector:name}}, {{contacts:Inspector:phone}}, {{contacts:Inspector:email}}. The role in the tag must match the role on the contact, and the person has to be on the transaction as a contact. An in-house agent added under Assign Agents is not a contact, and a contact tag written for them comes back empty, which is the question support hears most about these tags.

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

The same tags, one per role, also make a contact list template. Send it to the agent at whatever point suits your office and they have a backup of the lender, title, and escrow details in their own inbox.

## 6. Ask the Agent to Confirm Before Closing

A week before closing, send the agent a message that lays out what Pipeline holds: the transaction details from the standard tags, the lender, title, and escrow contacts from contact tags, and the docs deadline from a checklist due-date tag. Ask them to reply all with anything that needs changing and any last documents. They review from their inbox, and the reply lands on the transaction.

## 7. Add a Transaction Snapshot to Any Message

Not every message fits a template. Some offices build one short template that is nothing but a snapshot: transaction name, location, MLS number, label, status, and the key dates. Start any one-off message from it, write above the snapshot, and the recipient gets today's state of the deal at the bottom. The same block can sit at the foot of your other templates, and an expanded version with contacts and checklist due dates becomes a transaction report you can send to any party.

## 8. Send the Closing Package

When a deal closes, one template can hand the agent everything: a line pointing to the attached zip of their documents, a line pointing to the attached coversheet with the contacts on its last page, and the top few contacts written into the body with contact tags so they can be saved from the email. The template cannot carry the attachments, so attach the documents and the coversheet with contacts included when you send, and Send and Track Email Without Leaving the Transaction shows how to attach whole categories at once. Keep the word attached in the template, because Pipeline checks for it: send a message that says attached with nothing attached and it stops and asks before anything goes out, so a closing package never leaves empty.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

## 9. Let the Best Templates Send Themselves

A template with a date in it is a template that can be scheduled. Put a schedule on it under My Info and Pipeline queues the message on every transaction that reaches the rule, three business days before the inspection date, the day after acceptance, or when a task is checked off. The buyer check-in and the inspection reminder are the usual first two.

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

If you would rather start from a finished draft than a blank page, the Template Library holds ready-made messages for every stage of a deal.

The Message Template Library is a shelf of ready-made messages for every stage of a deal. Browse it, copy what fits, and make it your own.

See Template Library