

Transaction Coordinator Email & SMS Templates

The Complete 30-Template Swipe File

Copy, paste, and customize these proven templates to automate your workflow

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How to Use This Swipe File

1. **Copy & Paste** any template into your CRM or email system
 2. **Replace merge fields** like [AgentName], [ClientName], [PropertyAddress] with your CRM's merge field syntax
 3. **Customize** the tone and branding to match your business
 4. **Set up automation rules** to send templates at the right time
 5. **Track performance** and refine based on response rates
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Section 1: Agent & Vendor CRM Templates

Template #1: New Agent Outreach Email

Subject: Welcome to [YourCompany], [AgentName]!

Hi [AgentName],

I'm [YourName] with [YourCompany]. I saw your listing at [PropertyAddress] and wanted to introduce our transaction coordination services.

Here's what you'll get:

- Automated deadline tracking

- Custom email & SMS templates
- Real-time timeline updates

Can we hop on a 10-minute call on [Date] at [Time]? Let me know what works for you.

Thanks,

[YourName]

[ContactInfo]

Template #2: Property Inquiry Follow-Up

Subject: Next Steps on [PropertyAddress]

Hi [AgentName],

Thanks for sending the details on [PropertyAddress]. I've drafted the initial timeline—inspection, appraisal, financing, and closing dates are all mapped out in DocJacket.

Review it here: [Link]. Let me know if you'd like any tweaks or a quick walkthrough.

Cheers,

[YourName]

Template #3: Vendor Introduction Email

Subject: Meet Your TC for [PropertyAddress]

Hello [VendorName],

I'm [YourName] at [YourCompany], your Transaction Coordinator for [PropertyAddress]. I'll manage document uploads, deadline reminders, and status updates.

Expect:

- 📅 Due-date alerts
- 🗂️ Centralized doc uploads
- 📧 Email & SMS notifications

Please upload any outstanding docs by [Date] here: [Link]. Thanks!

– [YourName]

Template #4: Contract Deadlines Reminder

Subject: Reminder: Contingency Expires [Date]

Hi [AgentName],

Friendly reminder: the inspection contingency for [PropertyAddress] expires on **[Date]**. If you need an extension or have questions, please let me know.

All related automations will adjust once you update the date in DocJacket.

Best,

[YourName]

Template #5: Onboarding Welcome Email

Subject: Your First 3 Steps with [YourCompany]

Hi [AgentName],

Welcome to the team! Here are your first 3 actions to get started:

Step 1: Log into your DocJacket account: [Link] **Step 2:** Upload your current active contracts **Step 3:** Schedule your onboarding call: [CalendlyLink]

I'll personally walk you through our system and answer any questions.

Looking forward to working together!

[YourName]

Template #6: Document Upload Reminder

Subject: Missing Documents for [PropertyAddress] - Due [Date]

Hi [VendorName],

I'm still waiting for the following documents for [PropertyAddress]:

- [Document 1]
- [Document 2]
- [Document 3]

Deadline: [Date] at [Time]

Please upload here: [SecureLink]

Questions? Reply to this email or text me at [Phone].

Thanks,

[YourName]

Template #7: Post-Closing Thank-You Email

Subject: Another Successful Closing! 🎉

Hi [AgentName],

Congratulations on closing [PropertyAddress]! Here's what we accomplished together:

- ✅ 0 missed deadlines
- ✅ 100% document compliance
- ✅ Smooth closing process
- ✅ Happy clients

Your ROI with our service:

- Time saved: [Hours] hours
- Stress reduced: Immeasurable
- Client satisfaction: Exceptional

Ready for the next one?

Cheers,

[YourName]

Template #8: Feedback Request Email

Subject: Quick Favor - 30 Seconds?

Hi [AgentName],

Hope you're doing well! Could you do me a quick favor and leave a short review about working with us on [PropertyAddress]?

Option 1: Google Review: [GoogleLink] **Option 2:** Just reply with 1-2 sentences

Your feedback helps other agents discover our services and keeps us improving.

Thanks a million!

[YourName]

Template #9: Appointment Confirmation SMS

SMS Template:

Hi [AgentName]! This is [YourName] confirming our demo call tomorrow at [Time]. Reply YES to confirm or call me at [Phone] to reschedule. Looking forward to showing you how we can save you 10+ hours per transaction!

Template #10: Deadline Alert SMS

SMS Template:

[AgentName], your [DeadlineName] for [PropertyAddress] is TOMORROW ([Date]). Need an extension? Text me back or call [Phone]. - [YourName]

Section 2: Buyer-Side Templates

Template #11: Buyer Introduction Email

Subject: Congrats on Your Accepted Offer, [ClientName]!

Hi [ClientName],

Congrats on getting your offer accepted for [PropertyAddress]! I'm [YourName], your TC, and I'll handle:

- Inspection scheduling
- Appraisal coordination
- Loan status updates
- Final walk-through reminders

Expect a few emails over the next few weeks. Reach out anytime!

Best,

[YourName]

Template #12: Inspection Coordination

Subject: Scheduling Your Inspection

Hi [AgentName],

Let's book the inspection for [PropertyAddress]. How does [Date1] at [Time1] or [Date2] at [Time2] look? I'll confirm once you pick one and update DocJacket.

Thanks,
[YourName]

Template #13: Financing Status Update

Subject: Loan Status: [Status]

Hi [ClientName],

Your loan for [PropertyAddress] is now **[Status]**. Expected clear-to-close date: [Date]. I'll keep you posted on any changes.

Let me know if you have questions!

Cheers,
[YourName]

Template #14: Appraisal Appointment Email

Subject: Appraisal Scheduled for [PropertyAddress]

Hi [ClientName],

Your appraisal is set for **[Date] at [Time]**.

What you need to know:

- The appraiser needs interior access
- You don't need to be present
- Access details: [LockboxCode/KeyLocation]
- Appraiser contact: [AppraiserName] at [Phone]

Questions? Just reply or text me at [Phone].

Best,
[YourName]

Template #15: Buyers' Closing Cost Estimate

Subject: Your Closing Cost Breakdown

Hi [ClientName],

Attached is your estimated closing cost breakdown for [PropertyAddress].

Summary:

- Purchase Price: [Price]
- Down Payment: [Amount]
- Closing Costs: [Amount]
- **Total Cash Needed: [Amount]**

Please review and let me know if you have any questions. We'll get a final statement 3 days before closing.

Best,

[YourName]

Template #16: Final Walk-Through Reminder

Subject: Final Walk-Through Tomorrow!

Hi [ClientName],

Your final walk-through is tomorrow at [Time]. Here's your checklist:

Check that: All agreed-upon repairs are complete Property is in same condition as when you made the offer All systems are working (lights, plumbing, HVAC) Seller has removed all personal items All included items are still there

Meet your agent at [PropertyAddress]. Any issues? Contact me immediately at [Phone].

Almost there!

[YourName]

Template #17: Utility Transfer Reminder

Subject: Time to Set Up Your Utilities

Hi [ClientName],

It's time to transfer utilities for [PropertyAddress]. Here's your checklist:

Electric: [Company] - [Phone] **Gas:** [Company] - [Phone] **Water/Sewer:** [Company] - [Phone]

Internet/Cable: [Company] - [Phone] **Trash/Recycling:** [Company] - [Phone]

Transfer Date: [ClosingDate]

Most companies need 3-5 business days notice. Get started today!

Questions? Just reply.

[YourName]

Template #18: Move-In Coordination Email

Subject: Moving Day Checklist 📦

Hi [ClientName],

Congrats on your new home! Here's your move-in checklist:

Before Moving Day: Schedule movers/truck rental Update address with bank, employer, subscriptions Transfer prescriptions to local pharmacy Register kids for new school district

First Week: Change locks Test smoke/carbon monoxide detectors Locate circuit breakers and water shut-off Find local emergency services numbers

Don't Forget: Update voter registration Get new driver's license/vehicle registration Find new doctors/dentist

Enjoy your new home!

[YourName]

Template #19: Refinance Follow-Up Service Offer

Subject: Ready to Save on Your Mortgage?

Hi [ClientName],

Hope you're loving your home at [PropertyAddress]!

With rates changing, it might be time to consider refinancing. Our preferred lender can run a quick analysis to see if you could save money.

Quick Benefits Check:

- Lower monthly payment?

- Cash out for improvements?
- Shorter loan term?

Interested? Just reply and I'll connect you with [LenderName] for a free consultation.

Best,
[YourName]

Template #20: Anniversary Check-In Email

Subject: Happy Home-iversary! 🎉

Hi [ClientName],

Can you believe it's been a year since you moved into [PropertyAddress]? Time flies!

How's everything going?

- Any home improvements planned?
- Thinking about your next real estate move?
- Know anyone looking to buy or sell?

We'd love to help with your next transaction or assist any friends/family you refer. As a thank you, we offer a \$200 gift card for successful referrals.

Hope you're still loving your home!

Warm regards,
[YourName]

Section 3: Seller-Side Templates

Template #21: Listing Intake Email

Subject: Your Listing Is Live at [PropertyAddress]

Hi [AgentName],

Your property at [PropertyAddress] is officially live! As your TC, I'll coordinate:

1. Marketing assets upload
2. Disclosure reviews
3. Showing schedules

Check off tasks in DocJacket and let me know if anything comes up.

Best,
[YourName]

Template #22: Offer Received Notification

Subject: New Offer for [PropertyAddress]! 🎉

Hey [AgentName],

An offer just came in:

- **Buyer:** [ClientName]
- **Price:** [OfferAmount]
- **Earnest Money:** [Amount]
- **Financing:** [Type]
- **Closing Date:** [Date]
- **Expiration:** [Date] at [Time]

Tell me how you'd like to proceed, and I'll update our timeline.

Cheers,
[YourName]

Template #23: Net Proceeds Estimate

Subject: Estimated Net Proceeds for [PropertyAddress]

Hi [AgentName],

Here's a quick breakdown for [PropertyAddress]:

Financial Summary:

- Sale Price: [Price]
- Commission: [Amount]
- Title/Escrow Fees: [Amount]
- Other Closing Costs: [Amount]
- **Estimated Net Proceeds: [Amount]**

Review and let me know if we need to adjust anything.

Thanks,

[YourName]

Template #24: Post-Closing Review Request

Subject: How Did We Do?

Hi [AgentName],

Now that we've successfully closed [PropertyAddress], I'd love to get your feedback on our transaction coordination service.

Quick questions:

1. What worked best for you?
2. What could we improve?
3. Would you recommend us to other agents?

Leave a Review:

- Google: [GoogleLink]
- Facebook: [FacebookLink]
- Or just reply here

Your feedback helps us serve agents better and helps other agents discover our services.

Thanks for trusting us with your transaction!

[YourName]

Template #25: Referral Request Email

Subject: Know Any Agents Who Need Help?

Hi [AgentName],

Thanks again for the great experience on [PropertyAddress]!

Quick question: Do you know any agents who could benefit from our transaction coordination services?

Our Referral Program:

- \$100 credit to your account for each successful referral
- They get their first transaction coordinated free
- We all win!

Just introduce us via email or have them mention your name when they contact us.

Appreciate you!

[YourName]

Template #26: Vendor Coordination Reminder

Subject: Status Check: [VendorType] for [PropertyAddress]

Hi [VendorName],

Just checking on the status of [ServiceType] for [PropertyAddress].

Original Schedule:

- Service Date: [Date]
- Expected Completion: [Date]

Current Status: [Status]

Please update me on:

1. Current progress
2. Any delays or issues
3. Expected completion date

The buyer's agent is asking for updates, so please respond by [Date].

Thanks,

[YourName]

Template #27: Commission Disbursement Notification

Subject: Your Commission Has Been Disbursed! 💰

Hi [AgentName],

Great news! Your commission for [PropertyAddress] has been processed and should appear in your account within 1-2 business days.

Transaction Summary:

- Property: [PropertyAddress]
- Closing Date: [Date]
- Commission Amount: [Amount]
- Disbursement Date: [Date]

Questions about your commission? Contact [BrokerageName] at [Phone].

Thanks for letting us coordinate this transaction!


[YourName]

Template #28: Title & Escrow Update

Subject: Title Update for [PropertyAddress]

Hi [AgentName],

Here's where we stand with title and escrow for [PropertyAddress]:

Title Status: Title search complete Title commitment issued  Waiting on: [Item if applicable]

Escrow Status: Earnest money received Documents uploaded  Next step: [NextStep]

Timeline:

- Final docs due: [Date]
- Closing scheduled: [Date] at [Time]

Everything is on track! Questions? Just reply.

Best,

[YourName]

Template #29: HOA/Condo Docs Request

Subject: HOA Documents Needed - Due [Date]

Hi [AgentName],

I need the following HOA/Condo documents for [PropertyAddress] by [Date]:

Required Documents: ☐ CC&Rs (Covenants, Conditions & Restrictions) ☐ Bylaws ☐ Financial statements (last 2 years) ☐ Meeting minutes (last 12 months) ☐ Rules and regulations ☐ Resale certificate ☐ Management company contact info

Upload Link: [SecureUploadLink]

Deadline: [Date] at [Time]

This is required for the buyer's loan approval. Please prioritize!

Thanks,

[YourName]

Template #30: Utility Cut-Off Reminder

Subject: Utility Transfer Reminder for [PropertyAddress]

Hi [AgentName],

Reminder to coordinate utility transfers for [PropertyAddress]:

Seller's Action Items:

- Schedule final meter readings for [ClosingDate]
- Provide final bills to title company
- Leave account numbers for buyer

Utilities to Transfer:

- Electric: [Company] - [Phone]
- Gas: [Company] - [Phone]
- Water/Sewer: [Company] - [Phone]
- Trash: [Company] - [Phone]

Timing: Most companies need 3-5 business days notice.

Let me know when this is complete!

[YourName]

Section 4: Bonus Transaction Phase Templates

1. Introduction to Seller

Email Version

To: Seller **Subject:** Welcome! Your Transaction Coordinator for {Property Address}

Hello {Seller's Name},

I'm {Your Name}, your dedicated transaction coordinator at {Company}. I'll handle all the behind-the-scenes details—paperwork, scheduling, and keeping everyone on track—so you can focus on your move.

Here's what to expect:

- **Regular updates:** I'll email you key milestones and reminders
- **Quick responses:** Reach out by reply or text whenever you have questions
- **Peace of mind:** I'll anticipate issues and proactively solve them

Looking forward to guiding you smoothly to closing!

Warm regards,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Hi {Seller's Name}, this is {Your Name}, your transaction coordinator for {Property Address}. I'll handle all the details and send you updates. Text or call me anytime at {Phone}!

2. Introduction to Buyer's Agent

Email Version

To: {Buyer's Agent} **Subject:** Meet Your Transaction Coordinator for {Property Address}

Hello {Buyer's Agent},

I'm {Your Name}, transaction coordinator for {Seller's Name} on {Property Address}. I'll manage all administrative tasks—packets, timelines, and communications—to ensure a seamless closing.

Feel free to reach out if you need docs, status updates, or have any questions.

Best,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Hi {Buyer's Agent}, I'm {Your Name}, coordinating the {Property Address} sale for {Seller's Name}. I handle all paperwork and timelines—text me anytime at {Phone}.

3. Introduction to Title Company

Email Version

To: {Title Company} **Subject:** Transaction Coordinator Intro for {Property Address}

Hello {Title Company Name},

I'm {Your Name}, transaction coordinator for {Seller's Name} on {Property Address}. Below is a quick summary:

- **Legal Address:** {Legal Address}
- **Title #:** {Title Number}
- **Listing Agent:** {Name, Brokerage}
- **Buyer's Agent:** {Name, Brokerage}
- **Closing Date:** {Date}

Seller Contact: {Seller's Name} | {Phone} | {Email}

Please let me know if you need any additional docs or info. I've attached the purchase contract for your records.

Thank you,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Hi {Title Co Name}, this is {Your Name}, TC for {Property Address}. I sent the purchase contract via email—let me know if you need anything else. Thanks!

4. Under Contract Notification

Email Version

To: Seller **Subject:** Congrats! Next Steps for {Property Address}

Hi {Seller's Name},

Your offer is conditionally accepted—congratulations! Below are key dates:

Condition	Deadline
Inspection contingency	{Date}
Financing contingency	{Date}
Survey completion	{Date}
Closing Date	{Date}
Earnest Funds Due	{Date}

What's next?

- I'll confirm the inspection schedule once the buyer's agent sets it
- Please send me your chosen title company's details
- Keep the home in its current condition until closing

Attached is the signed contract. Reach out with any questions!

Best,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Congrats, {Seller's Name}! Your offer on {Property Address} is accepted. Key deadlines emailed—reach me at {Phone} with any questions.

5. Earnest Funds Update

Email Version

To: Seller **Subject:** Earnest Deposit Received

Hello {Seller's Name},

The title company has confirmed receipt of the earnest money. Details:

- **Amount:** {Amount}
- **Date:** {Date}

- **Escrow Company:** {Escrow Co Name}

I've attached the receipt for your records. Let me know if you need anything else!

Thanks,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Hi {Seller's Name}, the earnest deposit of {Amount} was received on {Date}. Receipt emailed—text me if you have any questions.

6. Appraisal Scheduling

Email Version

To: Seller **Subject:** Appraisal Set for {Property Address}

Hello {Seller's Name},

Your appraisal is scheduled for **{Date} at {Time}**. The appraiser needs interior access—please ensure the home is unlocked.

If that time doesn't work, let me know right away so we can reschedule.

Thank you,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Your appraisal for {Property Address} is set for {Date} at {Time}. Please make sure the home is unlocked. Questions? Text me at {Phone}.

7. Survey Appointment

Email Version

To: Seller **Subject:** Survey Scheduled for Your Property

Hello {Seller's Name},

{Survey Company} will survey your property on **{Date}**. No entry into your home is needed, and you don't have to be present.

Feel free to reach out if you have any concerns.

Best,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Survey of your property by {Survey Company} is on {Date}. No action needed on your part—just FYI. Questions? {Phone}.

8. HOA Documents Transfer

Email Version

To: Buyer's Agent **Subject:** HOA Docs for {Property Address}

Hello {Buyer's Agent},

Attached are the HOA documents for {Property Address}:

- CC&Rs
- Bylaws
- Meeting Minutes
- Financials
- Rules & Regs
- Resale Certificate (if applicable)

Let me know if you need anything else.

Thanks,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Just emailed the HOA docs for {Property Address}. Let me know if you need additional info—{Phone}.

9. Inspection Details

Email Version

To: Seller **Subject:** Property Inspection Scheduled

Hello {Seller's Name},

Your home inspection is set for **{Date} at {Time}**. To prepare:

- Clear access to attic, basement, and all rooms
- Ensure utilities are on
- Remove clutter

The inspector will use the lockbox; you don't need to be present. Let me know if you need to reschedule.

Regards,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Inspection for {Property Address} is on {Date} at {Time}. Please clear access and keep utilities on.

Questions? {Phone}.

10. Title Commitment Update

Email Version

To: Seller **Subject:** Title Commitment Received

Hi {Seller's Name},

Good news—the title commitment is in, and there are **no outstanding liens**. I've attached the document; please review it and let me know if you have any questions.

Thanks,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Title commitment for {Property Address} shows no liens. I emailed you the document—text me if anything looks off. {Phone}

11. Final Walk-Through

Email Version

To: Seller **Subject:** Final Walk-Through Scheduled

Hello {Seller's Name},

Your final walkthrough is **{Date} at {Time}**. Please:

- Remove personal items
- Turn on utilities
- Complete all agreed repairs

If you need to adjust the time, let me know ASAP.

Thank you,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Final walkthrough for {Property Address} is {Date} at {Time}. Please remove personal items and turn on utilities. Text to reschedule: {Phone}.

12. Property Sold Notification

Email Version

To: Seller **Subject:** SOLD! Next Steps

Congratulations, {Seller's Name}! Your property is officially sold.

Before closing:

- Keep the home in its current condition
- Remove all personal items
- Leave keys & codes as discussed
- Maintain insurance until possession

- Schedule utility transfers

I'm coordinating the final details and will update you when closing is confirmed.

Cheers,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Your home at {Property Address} is SOLD! 🎉 Check your email for final steps. Questions? Text me at {Phone}.

13. Approaching Closing

Email Version

To: Seller **Subject:** Closing Day Approaching

Hello {Seller's Name},

Closing is on **{Date} at {Time}** at {Title Co/Attorney's Office}. Address and contact info:

{Office Name}

{Address}

{Phone}

Bring:

- 2 forms of ID
- Bank info for proceeds wiring

Let me know if you have any last-minute questions.

Best,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Closing for {Property Address} is {Date} at {Time} at {Office Name}. Check email for details. Text if you need anything: {Phone}.

14. Review Request

Email Version

To: Listing Agent **Subject:** Thanks for Your Business!

Hello {Listing Agent},

Thank you for trusting me with {Property Address}. If you'd like to share feedback, you can:

- Leave a Facebook or Google review: {LINK}
- Reply here with your comments

Referrals are always appreciated—let me know if you have colleagues who need coordination support!

Many thanks,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Thanks for partnering on {Property Address}! If you have a moment to leave a Google review, it'd mean a lot: {LINK}. Thanks again—{Phone}.

15. Possession Day

Email Version

To: Seller **Subject:** Possession Day!

Hi {Seller's Name},

Congrats on a smooth closing today! Funds have been transferred, and you're officially moved out.

Wishing you all the best in your next chapter.

Warmly,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Closing went smoothly—funds transferred and keys exchanged. Congratulations, {Seller's Name}! 🎉
{Phone}

16. Post-Closing Thank You (Listing Agent)

Email Version

To: {Listing Agent} **Subject:** Celebrating a Successful Sale

Hello {Listing Agent},

Thank you for the opportunity to coordinate {Property Address}. It's been a pleasure working together. Please find my invoice attached. Let me know if you have any questions.

Looking forward to our next transaction!

Best,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Thanks for working with me on {Property Address}! Invoice sent via email—let me know if you need anything else. {Phone}

17. Post-Closing Thank You (Buyer's Agent)

Email Version

To: {Buyer's Agent} **Subject:** Thank You!

Hello {Buyer's Agent},

It was a pleasure coordinating for {Property Address} and collaborating with you. Your professionalism made all the difference. I look forward to working together again.

Best regards,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Thanks for a great collaboration on {Property Address}! Appreciate your responsiveness—let's do it again soon. {Phone}

18. Weekly Update to Listing Agent

Email Version

To: {Listing Agent} **Subject:** Weekly Status: {Property Address} ({Date})

Hello {Listing Agent},

Here's this week's snapshot:

Item	Status	Notes
Contract	Pending	Buyer to remove contingencies by {Date}
Earnest Funds	Received	
Financing Contingency	In Progress	Update expected {Date}
Appraisal	Scheduled	{Date} at {Time}
Title Search	In Progress	Title co. report due {Date}
Inspections	Scheduled	{Date(s)}
HOA Docs	Sent	
Approaching Closing Tasks	Not started	Planning for closing on {Date}

Upcoming Deadlines:

- Financing: {Date}
- Inspection: {Date}

Action Items:

- {Agent Action Item 1}
- {Agent Action Item 2}

Let me know if you need anything else.

Thanks,

{Your Name}

Transaction Coordinator

{Phone} | {Email}

SMS Version

Weekly update for {Property Address}: see your email for details on contingencies, appraisal, and next steps. Let me know if you need anything! {Phone}

Section 5: Quick Setup Guide

Setting Up Your Templates

Step 1: Choose Your Platform

- **DocJacket:** Communications → Templates → New Template
- **Other CRMs:** Look for "Templates," "Canned Responses," or "Email Templates"
- **Email Clients:** Most have template or signature features

Step 2: Copy and Customize

1. Copy any template from this guide
2. Replace placeholder text with your information:
 - [YourName] → Your actual name
 - [YourCompany] → Your business name
 - [ContactInfo] → Your phone and email
3. Adjust the tone to match your brand voice

Step 3: Set Up Merge Fields

Map these common merge fields in your CRM:

- [AgentName] / {Agent Name}
- [ClientName] / {Client Name}
- [PropertyAddress] / {Property Address}
- [Date] / {Date}
- [Time] / {Time}
- [Price] / {Price}
- [Phone] / {Phone}

Step 4: Create Automation Rules

Set up triggers to send templates automatically:

- "Send Template #11 when contract status = 'Under Contract'"

- "Send Template #16 2 days before inspection date"
- "Send Template #4 1 day before contingency expires"

Step 5: Track and Optimize

Monitor these metrics:

- **Email open rates** (aim for 25%+)
- **Response rates** (aim for 15%+)
- **Time saved per transaction** (track hours)
- **Client satisfaction scores**

Pro Tips for Maximum Effectiveness

Email Best Practices

- **Subject lines:** Keep under 50 characters, use action words
- **Timing:** Send between 10 AM - 2 PM for best open rates
- **Mobile:** 60% of emails are opened on mobile—keep it concise
- **Personalization:** Use merge fields and reference specific details

SMS Best Practices

- **Length:** Stay under 160 characters
- **Timing:** Avoid early morning (before 8 AM) or late evening (after 9 PM)
- **Tone:** More casual than email, but still professional
- **Frequency:** Don't overuse—save for urgent or time-sensitive messages

Customization Ideas

- **Add your logo** to email templates
- **Include your headshot** in introduction emails
- **Use your brand colors** for formatting
- **Add social media links** to signatures
- **Include testimonials** in follow-up emails

Common Merge Field Syntax

Different platforms use different syntax:

- **DocJacket:** [FieldName]
- **HubSpot:** {{contact.firstname}}
- **Mailchimp:** |FNAME|
- **Constant Contact:** %%FirstName%%

Check your platform's documentation for the correct format.

About This Swipe File

This collection of 48 total templates (30 main + 18 bonus) is designed to cover every phase of real estate transaction coordination. Use them as-is or customize them to match your brand and workflow.

Need help implementing these templates? Visit DocJacket.com for a transaction coordination platform built specifically for real estate professionals.

© 2025 - *These templates are free to use and modify for your business. Please don't resell or redistribute this collection.*