

Email Docs & Notes from Transactions

SUMMARY

Learn how to send messages and docs directly from a transaction to internal and external recipients.

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[Effortless Messaging](#)

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Introduction

Adding notes and sending emails from a transaction is the primary method of communicating with

your team and outside contacts involved with a transaction. More than just a simple emailer, the transaction-specific message area offers several useful tools to help you create detailed, informative, personalized messages with lightning speed to keep everyone informed at every stage of the transaction. All of a transaction's notes and emails are displayed in the *Notes & Sent Emails* section near the bottom of the transaction for easy access to all the transaction's past communication in one place.

✎ Emails sent from a transaction are sent in Pipeline's styled format. Master admins may set all messages sent from your company's transactions to be sent with minimal formatting instead. [Learn how to Use Minimal Formatting for Emails Sent from Transactions →](#)

Who Can Do This?

All Pipeline users that have access to a transaction can send a note or email from the transaction.

Video

🕒 1:06

Send a Transaction Note or Email

To send a transaction message:

- 1 Go to a transaction.
- 2 Scroll down the page and click [Note / Email] just above the *Documents* area.

✎ Whenever it's more convenient, record a quick audio message to add a personalized recording to a note or email. [Learn how to Send or Add Audio Messages from Transactions →](#)

Specify Recipients

✎ Adding a Note? If you're adding a note (instead of sending an email), there's no need to add a recipient. [Skip ahead](#) to add a message.

To specify a recipient:

- 1 To send an email to an agent or staff member, select the checkbox to the left of their name.

Note / Email Add Contact Merge Docs Upload Docs Search Docs

Email this message to:

- ☐ Listing agents
- ☐ Elijah McCoy

Staff (7)

- ☐ April O'Neil
- ☐ Hollis Holcomb
- ☐ Rachel McWhirter
- ☐ Ramu Tremblay
- ☐ Carol Francis
- ☐ Monta Test It Fleming
- ☐ Rajesh Dhawan

Send to an external email address ⓘ
Enter email addresses

Subject ⓘ Add autofill tag Message Templates
Enter subject Choose a saved message template

Message Audio Message Add autofill tag
Type your message here

- 2 To send an email to an external recipient, enter their email address in the **Send To An External Email Address** field.

Note / Email Add Contact Merge Docs Upload Docs Search Docs

Email this message to:

- ☐ Listing agents
- ☐ Elijah McCoy

Staff (7)

- ☐ April O'Neil
- ☐ Hollis Holcomb
- ☐ Rachel McWhirter
- ☐ Ramu Tremblay
- ☐ Carol Francis
- ☐ Monta Test It Fleming
- ☐ Rajesh Dhawan

Send to an external email address ⓘ
Enter email addresses

Subject ⓘ Add autofill tag Message Templates
Enter subject Choose a saved message template

Message Audio Message Add autofill tag
Type your message here

- 3 To blind copy a recipient, click the **BCC** option, then enter their email address.

Note / Email Add Contact Merge Docs Upload Docs Search Docs

Email this message to:

- ☐ Listing agents
- ☐ Elijah McCoy
- ☐ Buying agents
- ☐ John Jacob

Staff (11)

- ☐ December Release
- ☐ Kristian Keane
- ☐ Misha March
- ☐ Professor Plum (Agent)
- ☐ Rajesh Dhawan
- ☐ Roger Klotz
- ☐ January Tester
- ☐ Kyn Holco
- ☐ Monta Test It Fleming
- ☐ Rachel McWhirter
- ☐ Ramu Tremblay

Send to an external email address ⓘ
Enter email addresses

Subject ⓘ Add autofill tag Message Templates
Enter subject Choose a saved message template

Message Audio Message Add autofill tag
Type your message here

If the external recipient is a contact or outside agent on the transaction, you can drag and drop their email address from the agent or contact areas above.

[Learn how to Email Contacts and Outside Agents here →](#)

[Learn about other time-saving drag 'n' drop features here →](#)

Add a Subject & Message

Use a Message Template

If you previously created any message templates or if an admin has shared any message templates with you, select a message template to instantly populate the subject and message fields with the template's information.

To use a message template:

- 1 Click **[Choose a Saved Message Template]** to select an existing template. Revise the message as needed before sending.

[Learn how to Create & Manage Reusable Message Templates here →](#)

The screenshot shows the 'Add Subject & Message' interface. At the top, there are tabs for 'Note / Email', 'Add Contact', 'Merge Docs', and 'Upload Docs', along with a 'Search Docs' search bar. Below the tabs, there's a section 'Email this message to:' with checkboxes for 'Listing agents' and 'Elijah McCoy'. To the right, there's a 'Staff (7)' section with checkboxes for 'April O'Neil', 'Carol Francis', 'Hollis Holcomb', 'Monta Test It Fleming', 'Rachel McWhirter', 'Rajesh Dhawan', and 'Ramu Tremblay'. Below this, there's a 'Send to an external email address' section with a text input field and a red arrow pointing to a 'Message Templates' dropdown menu. The dropdown menu is open, showing 'Choose a saved message template'. Below the dropdown, there's a 'Subject' section with a text input field and an 'Add autofill tag' button. At the bottom, there's a 'Message' section with a text input field and an 'Add autofill tag' button. The 'Message' section also has a tab for 'Audio Message'.

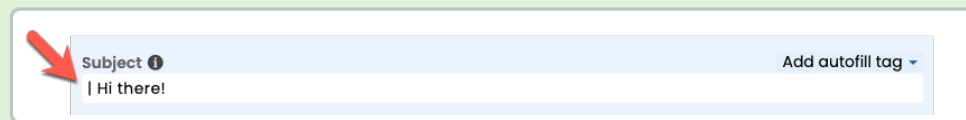
Complete the Message Fields

To complete the message fields:

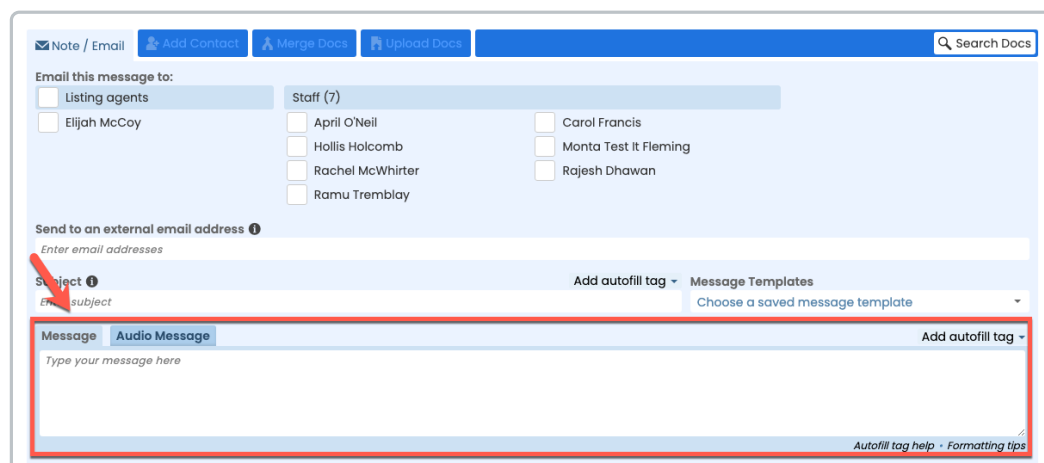
- 1 **Enter a subject.** If you leave the subject blank, Pipeline will automatically use the transaction name as the subject. If you enter a subject, the transaction name will automatically be added to the end of the subject.

The screenshot shows the 'Add Subject & Message' interface, similar to the one above. However, the 'Subject' section is highlighted with a red box, and a red arrow points to the 'Subject' text input field. The 'Subject' section also has an 'Add autofill tag' button. The 'Message' section is also visible, with a text input field and an 'Add autofill tag' button. The 'Message' section also has a tab for 'Audio Message'. At the bottom right, there's a link for 'Autofill tag help - Formatting tips'.

To omit the transaction name from your subject, start your subject line with a vertical bar "pipe character," |. You can enter the pipe character by pressing Shift + the \ key on your keyboard.

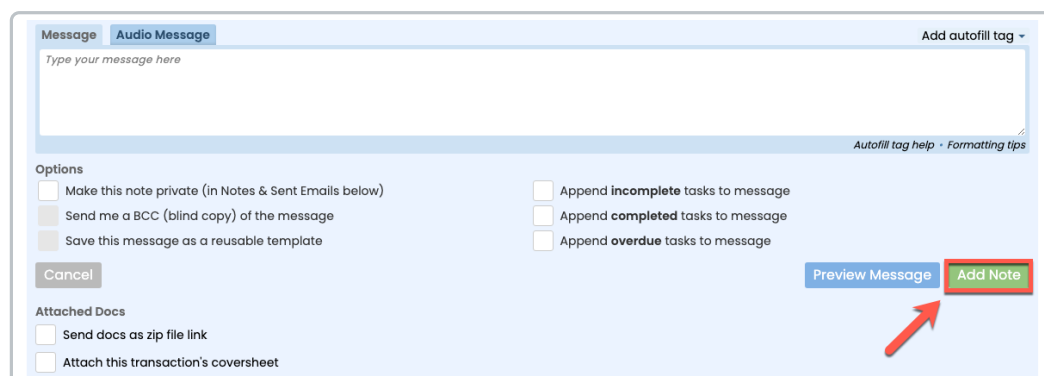


2 Enter a message.



3 Select any additional desired options(described below).

4 To send the message,click [Add Note] or [Send Email].



Options

Attach Docs

To attach docs to an email:

1 Select the checkboxes next to your desired doc(s)from the transaction'sDocs List or

Reference Docs.

Autofill tag help • Formatting tips

Options

☐ Make this note private (in Notes & Sent Emails below)
☐ Append **incomplete** tasks to message

☐ Send me a BCC (blind copy) of the message
☐ Append **completed** tasks to message

☐ Save this message as a reusable template
☐ Append **overdue** tasks to message

Cancel
Send Email

Attached Docs

☐ Send docs as zip file link
☐ Attach this transaction's coversheet

Check the yellow boxes of docs to attach below.

☐
Label
Document Name
Added On
Reviewed

Listing Docs – visible to listing agents on this transaction and office staff

☐ Listing Agreement
Feb 24, 2025
☒

☐ Sellers Property Disclosure
Feb 24, 2025
☒

Sale Docs – visible to listing and buying agents on this transaction and office staff

☐ Earnest Money Deposit
Apr 23, 2025
☒

☐ Lead-Based Paint Disclosure
Apr 23, 2025
☒

☐ Sample Purchase Contract
Apr 22, 2025
☐

☐
– Reference Docs
Added On

Optional Buyer Docs

☐ Buyer's Estimate Net Sheet
1 min ago

☐ Buyer's Checklist
1 min ago

☐ Downsizing Buyer Checklist
1 min ago

Optional Seller Docs

☐ Listing Checklist for Clients
1 min ago

Required Docs

☐ Purchase Contract
1 min ago

☐ Listing Agreement
1 min ago

☐ Financing Addendum
1 min ago

☐ Buyer-Broker Agreement
1 min ago

☐ Addendum (if needed)
1 min ago

Notes & Sent Emails

Jane Doe (sample user)
Missing Signature

To attach all docs on the transaction to your email, select the checkbox at the top of the documents list.

The screenshot shows the 'Listing Docs' table in the 'Listing' page. A red arrow points to the 'Document Name' column header. The table has columns: Document Name, Added On, Reviewed, and Entered. It lists three documents: 'For & Listing Agreement', 'Addendum', and 'Seller's Disclosure', all with a status of '22 hrs ago' and a 'Reviewed' checkbox.

Document Name	Added On	Reviewed	Entered
For & Listing Agreement	22 hrs ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Addendum	22 hrs ago	<input type="checkbox"/>	<input type="checkbox"/>
Seller's Disclosure	22 hrs ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>

To attach all docs in a specific *Document Category*, hold down the **[Shift]** key on your keyboard, then click any doc within your desired category. All docs in the category will be selected and you can individually deselect any that shouldn't be sent. [Learn more about Document Categories](#) →

☐ Send docs as zip file link
 ☐ Attach this transaction's coversheet

Check the yellow boxes below for docs you want to email.

<input type="checkbox"/> <input type="text" value="Label"/>	Document Name	Added On	Reviewed
Office Docs - visible to office staff			
<input type="checkbox"/>	Four Agency Disclosures	Dec 7, 2021	<input type="checkbox"/>
<input type="checkbox"/>	Agent	Dec 7, 2021	<input type="checkbox"/>
Listing Docs - visible to listing agents on this transaction and office staff			
<input type="checkbox"/>	Missir Listing Agreement	Dec 7, 2021	<input type="checkbox"/>
<input type="checkbox"/>	Missir Listing Agreement (#2)	4 mins ago	<input checked="" type="checkbox"/>
<input type="checkbox"/>	For Br Seller's Disclosure	4 mins ago	<input checked="" type="checkbox"/>
Sale Docs - visible to listing and selling agents on this transaction and office staff			
<input type="checkbox"/>	Rejec Amendment to Seller's Disclosure	4 mins ago	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Lemo Short Sale Agreement	4 mins ago	<input checked="" type="checkbox"/>
Buyer Docs - visible to selling agents on this transaction and office staff			
<input type="checkbox"/>	Four Earnest Money Deposit	4 mins ago	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Purple Inspection Report	4 mins ago	<input checked="" type="checkbox"/>

Notes & Sent Emails

System

status

Jan 30, 2020

Status changed from Listing to Expired / Withdrawn (Automatic Expiration).

System

Transaction expiry notification sent to:

Send Docs as Zip File Link

When you attach docs to an email, they'll be sent to the recipient as individual attachments or as links (if the combined size of the docs is more than 5mb). Optionally, you can send all attached docs as a link to a single Zip file package. This is a great way of generating a closing package of docs.

To send docs as a Zip file link:

- Once you've attached your desired docs to the email, select [Send Docs as Zip File Link]

☐ Make this note private (in Notes & Sent Emails below)
 ☐ Append **incomplete** tasks to message

☐ Send me a BCC (blind copy) of the message
 ☐ Append **completed** tasks to message

☐ Save this message as a reusable template
 ☐ Append **overdue** tasks to message

Cancel

Preview Message Add Note

Attached Docs

☒ Send docs as zip file link
 ☐ Attach this transaction's coversheet

Listing Agreement 0.1 MB
 Addendum 0.2 MB
 Seller's Disclosure 0.4 MB

<input checked="" type="checkbox"/> <input type="text" value="Label"/>	Document Name	Added On	Reviewed	Entered
Listing Docs - visible to listing agents on this transaction and office staff				
<input checked="" type="checkbox"/>	For Br Listing Agreement	22 hrs ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Addendum	22 hrs ago	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Seller's Disclosure	22 hrs ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Attach the Transaction's Coversheet

To attach the transaction's coversheet to your message:

1 Select [Attach this transaction's coversheet].

Options

- ☐ Make this note private (in Notes & Sent Emails below)
- ☐ Send me a BCC (blind copy) of the message
- ☐ Save this message as a reusable template
- ☐ Append **incomplete** tasks to message
- ☐ Append **completed** tasks to message
- ☐ Append **overdue** tasks to message

Cancel

Preview Message Add Note

Attached Docs

- ☐ Send docs as zip file link
- ☒ Attach this transaction's coversheet
- ☐ Include contacts in this coversheet

Check the yellow boxes below for docs you want to email.

2 Optionally, to include contacts with the coversheet, select [Include contacts in this coversheet].

Options

- ☐ Make this note private (in Notes & Sent Emails below)
- ☐ Send me a BCC (blind copy) of the message
- ☐ Save this message as a reusable template
- ☐ Append **incomplete** tasks to message
- ☐ Append **completed** tasks to message
- ☐ Append **overdue** tasks to message

Cancel

Preview Message Add Note

Attached Docs

- ☐ Send docs as zip file link
- ☒ Attach this transaction's coversheet
- ☒ Include contacts in this coversheet

Check the yellow boxes below for docs you want to email.

Attach Tasks

To share a list of tasks based on their status with someone from your team, select one of the options to append incomplete, completed, or overdue tasks to a message. When you append tasks to a note or message, tasks are smartly included in the message based on the task's visibility and the recipient's role in the transaction.

To append overdue, complete, or incomplete tasks to a note or email:

1 Click the desired [Append] option(s). If an option is not visible, that means there are no tasks of that type available to append.

[Learn how to Understand Checklists and Tasks here →](#)

Message Audio Message Add autofill tag

Type your message here

Autofill tag help Formatting tips

Options

- ☐ Make this note private (in Notes & Sent Emails below)
- ☐ Send me a BCC (blind copy) of the message
- ☐ Save this message as a reusable template
- ☐ Append **incomplete** tasks to message
- ☐ Append **completed** tasks to message
- ☐ Append **overdue** tasks to message

Cancel

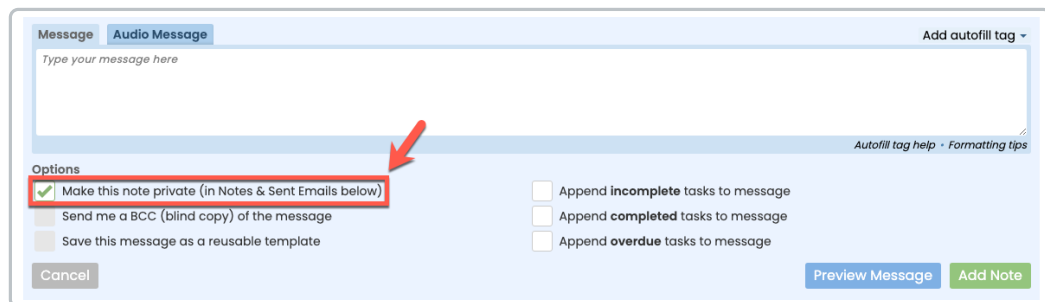
Preview Message Add Note

Recipients will only see tasks they have visibility to in Pipeline.
[Learn how to Set Task Visibility here →](#)

Make a Note or Email Private

To make a note / email private:

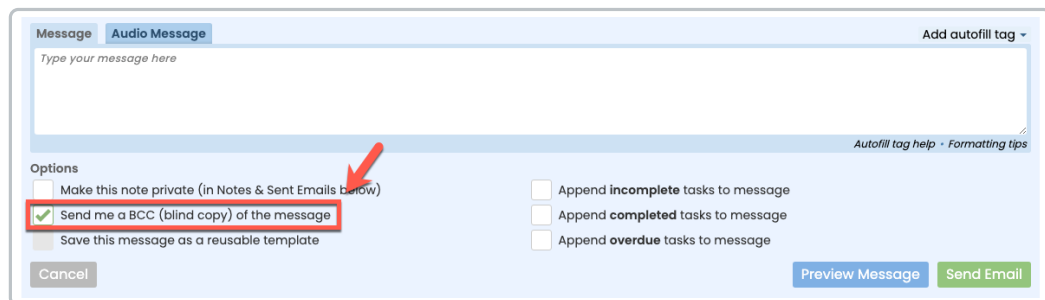
- 1 To make your note visible only to you, any internal recipients on the message, and admins, click **[Make this note private (in Notes & Sent Emails below)]**



Blind Copy (BCC) Yourself

To send a BCC (blind carbon copy) of an email to yourself:

- 1 Click **[Send me a BCC (blind copy) of the message]**.



Save Message as a Reusable Template

Reusable message templates help you save time on messages you send frequently. Include [autofill tags](#) in your message templates to create personalized, custom messages that can be used later with a single click.

[Learn more about how to Create & Manage Reusable Message Templates →](#)

To save the composed message and subject as a reusable template:

- 1 Click **[Save this message as a reusable template]**.

Message **Audio Message** Add autofill tag ▾

Type your message here

Autofill tag help • Formatting tips

Options

☐ Make this note private (in Notes & Sent Emails below)

☐ Send me a BCC (blind copy) of the message

☒ Save this message as a reusable template

☐ Append **incomplete** tasks to message

☐ Append **completed** tasks to message

☐ Append **overdue** tasks to message

Template Name ⓘ
New Template

Cancel Preview Message Send Email



When you're saving your message as a **reusable template**, you can use autofill tags to automatically input values from the transaction in the subject and message of any future messages sent using the template. [Learn more about Autofill Tags →](#)

Subject ⓘ Add autofill tag ▾ Message Templates
Enter subject Choose a saved message template

Message **Audio Message** Add autofill tag ▾

Type your message here

Autofill tag help • Formatting tips

Send Message Now

To send the message immediately:

- 1 When you're ready to send the message, click **[Send Email]** or **[Add Note]**.

Note / Email Add Contact Send to DocuSign Merge Docs Upload Docs Search Docs

Email this message to:

☐ Listing agents Staff (4)

☐ Otis Boykin ☐ Diana Test ☐ Hollis Holcomb

☐ Marie Brown ☐ Kyndall Holcomb ☐ Miriam Benjamin

Send to an external email address ⓘ
hollis+tj@paperlesspipeline.com Enter email addresses + bcc

Subject ⓘ Add autofill tag ▾ Message Templates
|Congrats, {{contacts:seller: first name}}! Intro to Seller

Message **Audio Message** Add autofill tag ▾

Hi {{contacts:seller: first name}},

Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking this journey with you.

If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate.

Autofill tag help Formatting tips

Options

☐ Make this note private (in Notes & Sent Emails below)

☐ Send me a BCC (blind copy) of the message

☐ Save this message as a reusable template

☐ Append **completed** tasks to message

Cancel Preview Message Send Email ▾

Attached Docs

☐ Send docs as zip file link

☐ Attach this transaction's coversheet

Check the yellow boxes of docs to attach below

Schedule Message to Send Later

Schedule a message to be automatically sent from a transaction on a specific date and time or on a date relative to an important transaction date.

To schedule the message to be sent later:

- 1 Click [the down arrow] attached to the **Send** button.
- 2 Select [Schedule Send].

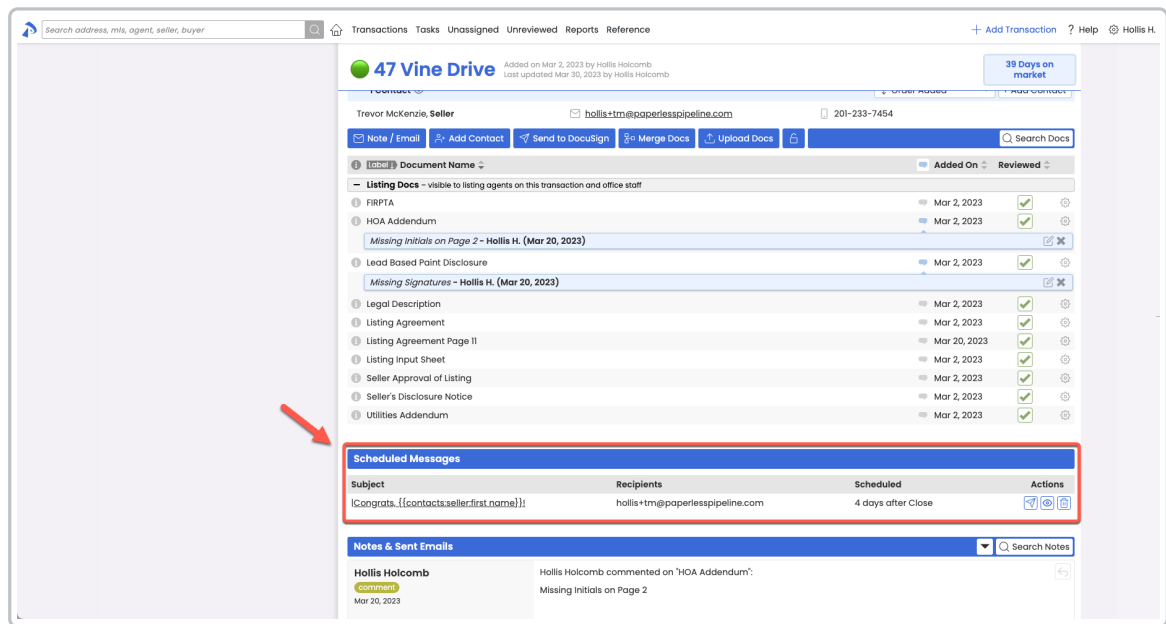
The screenshot shows the 'Send Email' form in the Paperless Real Estate system. The form is for a transaction titled '8138 Meadow Street', added on Mar 2, 2023, by Hollis Holcomb. The transaction is currently '49 Days on market'. The contact being emailed is Terrence Jensen, Seller, with email address hollis+tj@paperlesspipeline.com and phone number 978-223-3867. The form includes fields for 'Email this message to:' (Listing agents, Staff (4)), 'Send to an external email address' (hollis+tj@paperlesspipeline.com), 'Subject' (Congrats, {{contacts:seller:first name}}!), 'Message' (Hi {{contacts:seller:first name}}, Congratulations! Your house was officially listed with Paperless Real Estate on {{listing date}}. We look forward to taking this journey with you. If you have any questions along the way, please don't hesitate to contact your friends at Paperless Real Estate.), and 'Options' (Make this note private, Send me a BCC, Save this message as a reusable template, Append completed tasks to message). The 'Send Email' button is highlighted with a red box, and a red arrow points to the 'Schedule Send' button below it. The 'Schedule Send' button is also highlighted with a red box.

- 3 Schedule the message to be sent on a specific date or a date relative to the transaction:

- To schedule the message to be sent on a specific date and time, click [Absolute Date], set your desired date, choose a delivery time, and click [Schedule Send].
- To schedule the message to be sent on a date relative to the transaction, click [Relative Date], set your desired date rule, then click [Schedule Send].

- 4 Once the message has been scheduled, it will appear in your *Scheduled Messages* queue on the

transaction and will be automatically sent on the date (and time, if applicable) you specified.



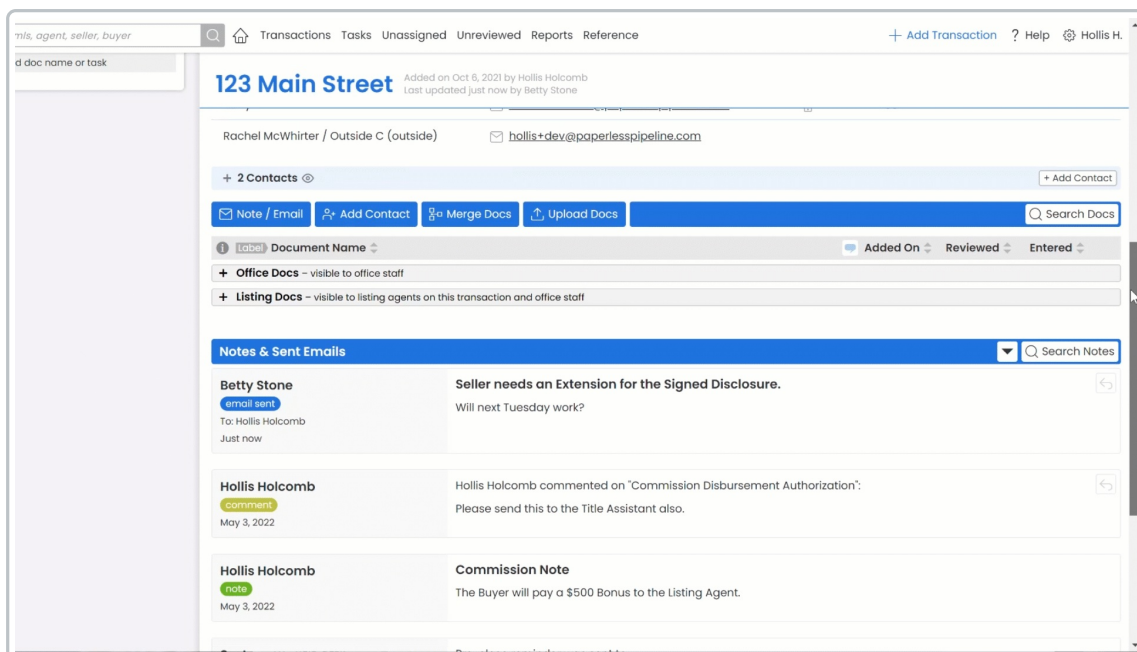
Reply to Transaction Messages

Reply to Emails in Pipeline

On transactions within Pipeline, reply to emails sent, emails received, and doc comments made.

To reply to an email or doc comment on a transaction:

- 1 Scroll down to the **Notes & Sent Emails** section.
- 2 Click the [Reply icon] next to the email or comment you are replying to.
- 3 Continue composing your email (as described above).



Reply to Emails Outside of Pipeline

Internal Recipients

Emails sent from Pipeline to internal recipients (users in your Pipeline account) will smartly include the recipient's maildrop address so that when they reply, their messages will automatically be sent back to the transaction. To send your reply back to Pipeline only, simply reply to the email. To send your reply to Pipeline, the sender, and all other recipients, "Reply All" to any such message. If there's anyone you do not want to receive the reply, remove them as recipients before sending your message.

[Learn more about Maildrop Addresses →](#)

External Recipients

When an external recipient replies to a message, that reply will be sent directly to the sender's email inbox (since external recipients don't have Pipeline maildrop addresses). For an external recipient to reply back to the sender only, they can simply reply to the email or, "reply all," to reply to the sender and all other recipients.

Email Faster and Smarter from Pipeline

This Pipeline Pro session covers multiple ways to streamline the process of emailing from Pipeline. We'll cover features and strategies to execute before and after the send.

[View more Pipeline Pro Webinars here →](#)

🕒 11:51

Effortless Messaging

In this Pipeline Pro session, learn the various ways to type less, optimize more, and make your messages do all the work!

[View more Pipeline Pro Webinars here →](#)

🕒 13:07

Be Bold! Format messages to look the way you want

Come learn the various formatting options that can help add emphasis, clarity, and readability to your messages in Pipeline. We'll also reveal an upcoming formatting option for tasks that can help improve your workflow.

[View more Pipeline Pro Webinars here →](#)

🕒 7:15