Emailing Docs & Notes from Transactions

SUMMARY

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

IN THIS ARTICLE

RELATED PIPELINE PRO WEBINAR RECORDINGS

- Email Faster and Smarter from Pipeline
- Effortless Messaging
- Be Bold! Format messages

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.

Video

1:06

Who Can Do This?

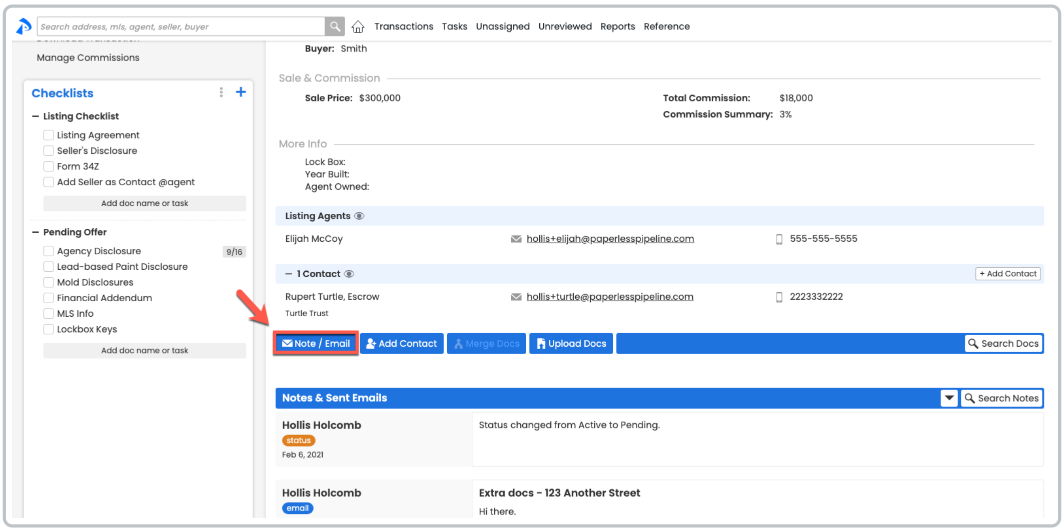
All Pipeline users that have access to a transaction can send a note or email from the transaction.

How To

Compose a Note or Email

To compose a note or email:

1. **Go to the transaction, scroll down the page, and click [Note/Email]**just above the list of documents.

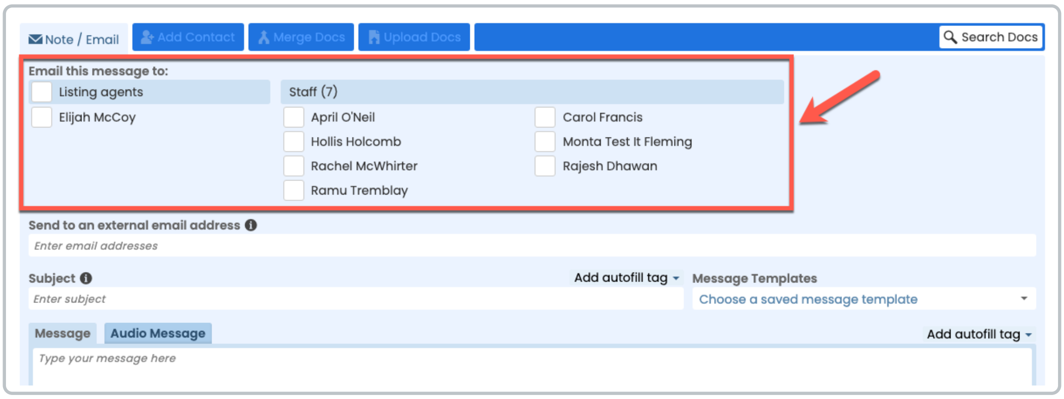


Send a Note vs. an Email

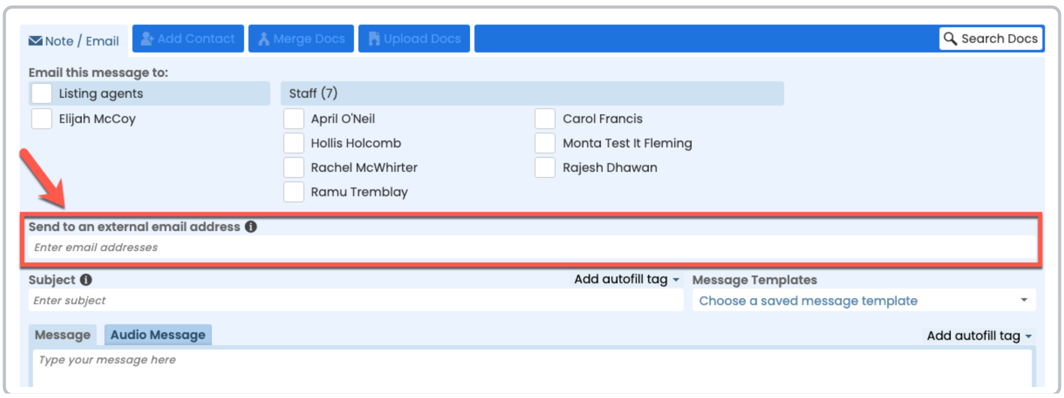
1. To add a note to the transaction without sending it to anyone, **don't specify a recipient.**
2. To send an email, **select or add a recipient.**

Specify Recipients

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



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

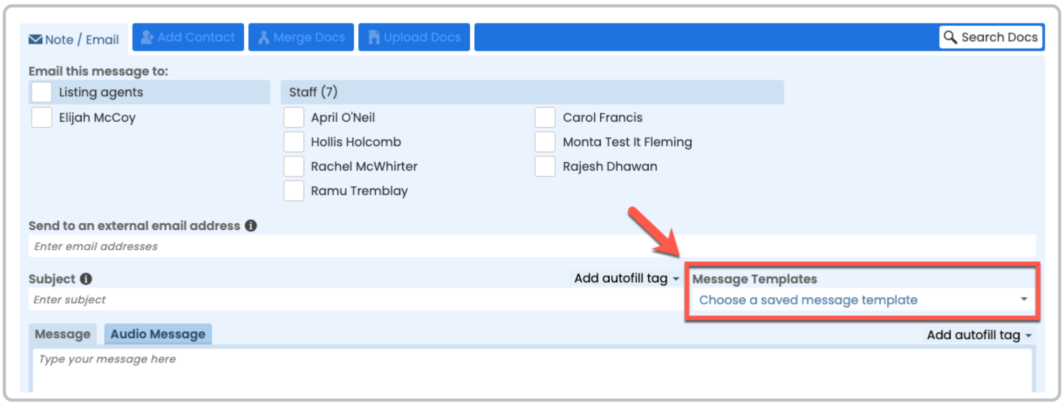


If the external recipient is a contact or outside agent on the transaction, you can drag and drop their email address from the agent or contact areas above.
Learn how to Email Contacts and Outside Agents here →
Learn about other time-saving drag 'n' drop features here →

Use a Message Template

1. If you previously created any message templates or if an admin has shared any message templates with you, **click [Choose a Saved Message Template] to select an existing template.** Selecting a message template instantly populates the subject and message fields with the template's information. You can revise the message as needed before sending.

   Learn how to Create & Manage Reusable Message Templates here →



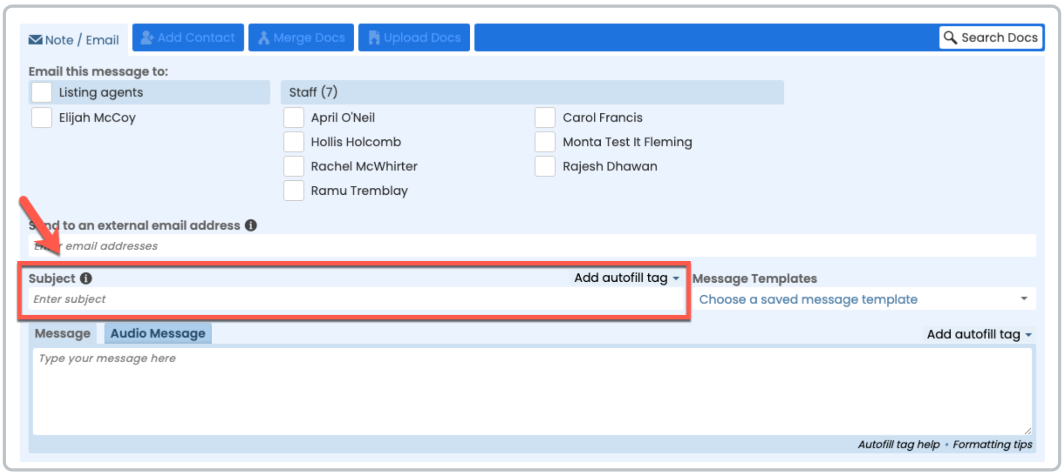
Send an Audio Message

Whenever it's more convenient, you can 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 here →

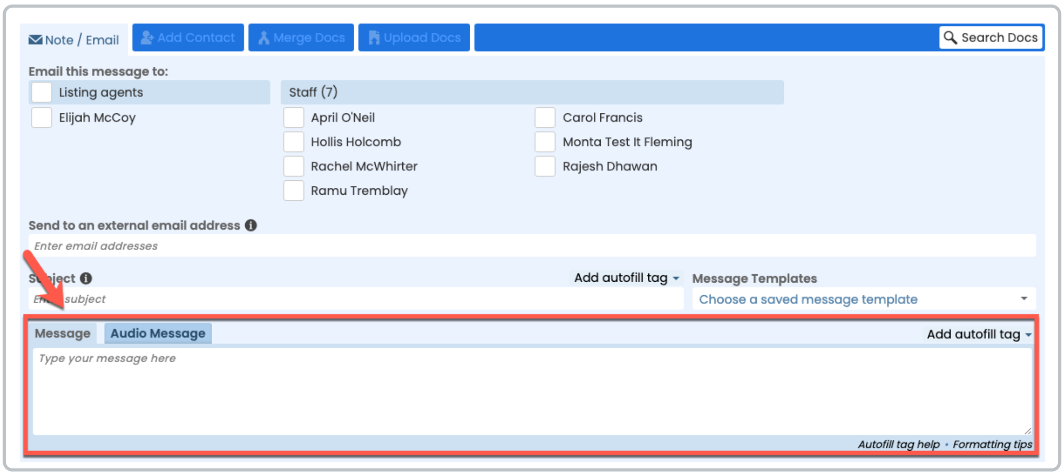
Complete the Message Fields

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.



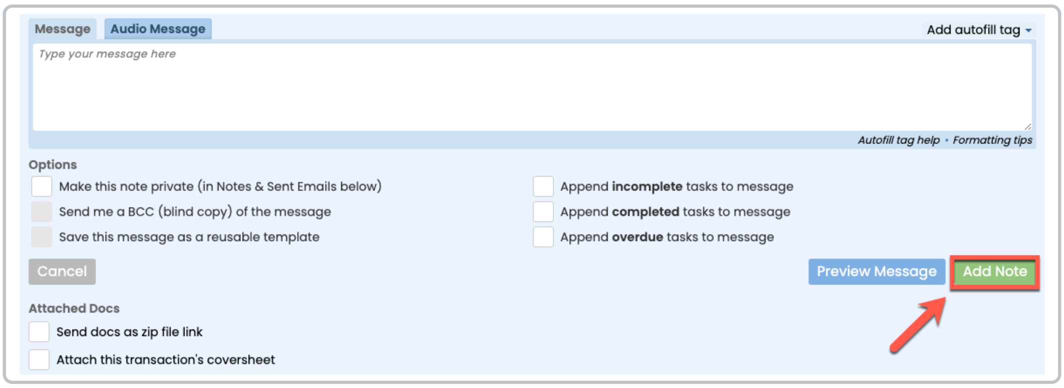
To omit the transaction name from your subject, start your subject line with a vertical bar "pipe character," |. You can enter the pipe character by pressing Shift + the \ key on your keyboard.

2. **Enter a message.**



3. **Select** **any additional desired options**.

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

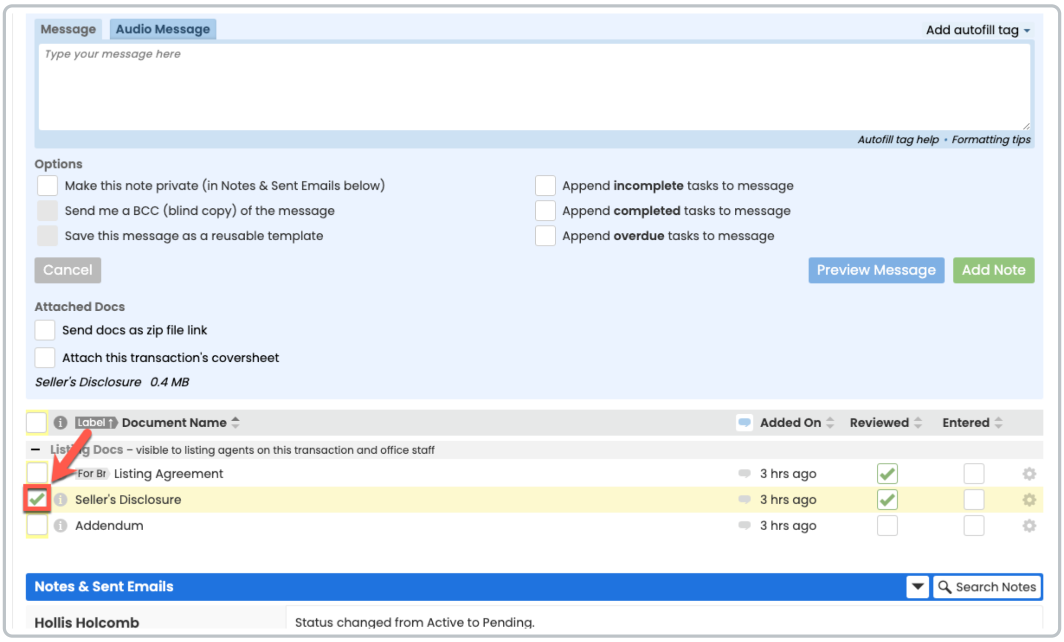


Options

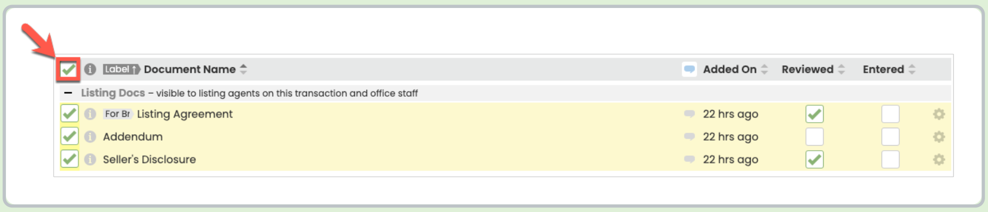
Attach Docs

To attach docs to an email:

1. **Select the checkbox next to your desired doc(s)** from the list of documents below the Note / Email section.



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

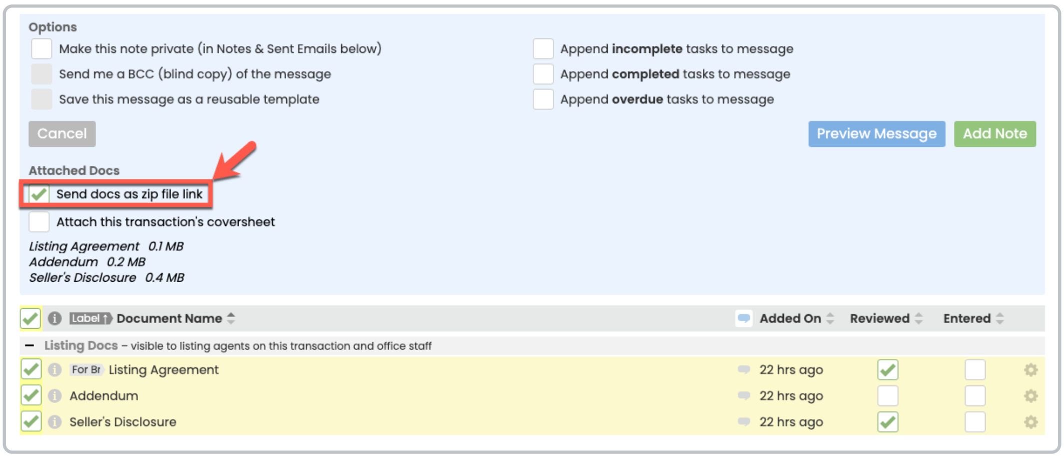


Send Docs as Zip File Link

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.

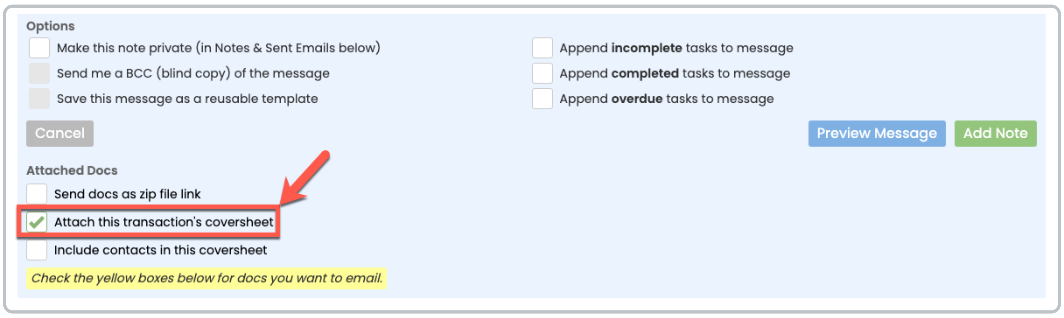
To send docs as a Zip file link:

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

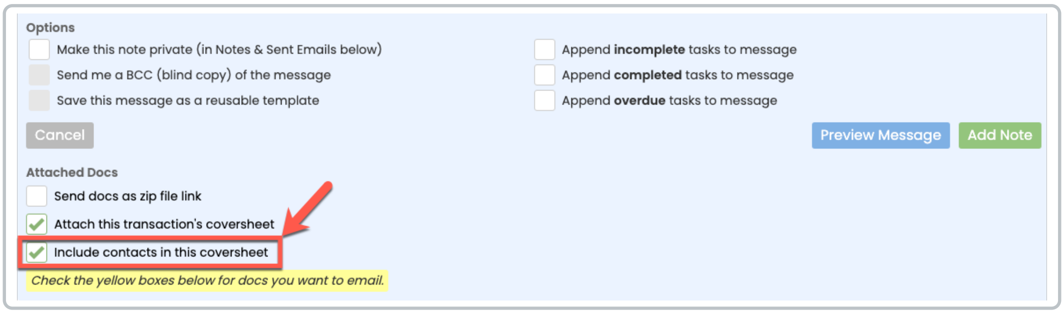


Attach the Transaction's Coversheet

1. To attach the transaction's coversheet to your message,**select [Attach this transaction's coversheet].**



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



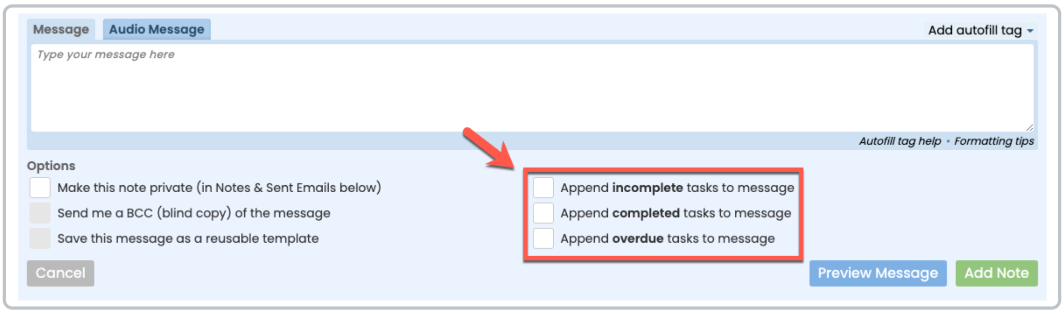
Attach Tasks

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 →

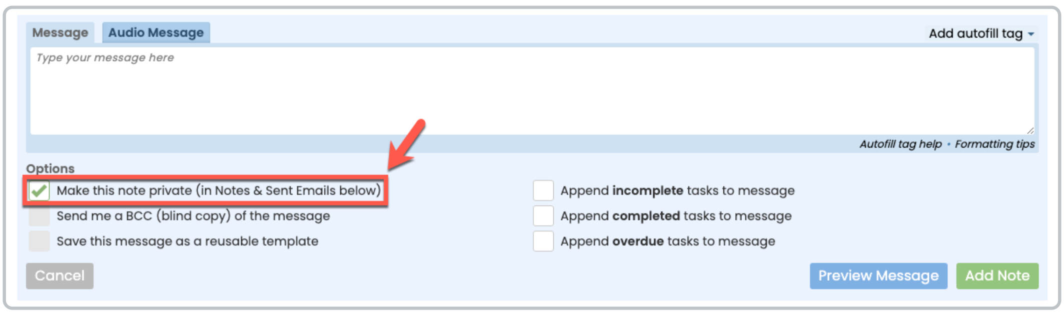


Recipients will only see tasks they have visibility to in Pipeline.
Learn how to Set Task Visibility here →

Make a Note or Email Private

To make a note / email private:

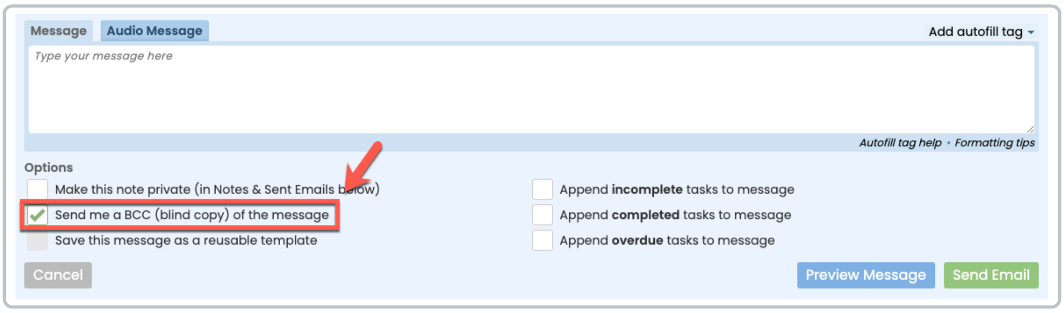
1. To make your note visible only to you, any internal recipients on the message, and admins, **click [Make this note private (in Notes & Sent Emails below)]**



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].**



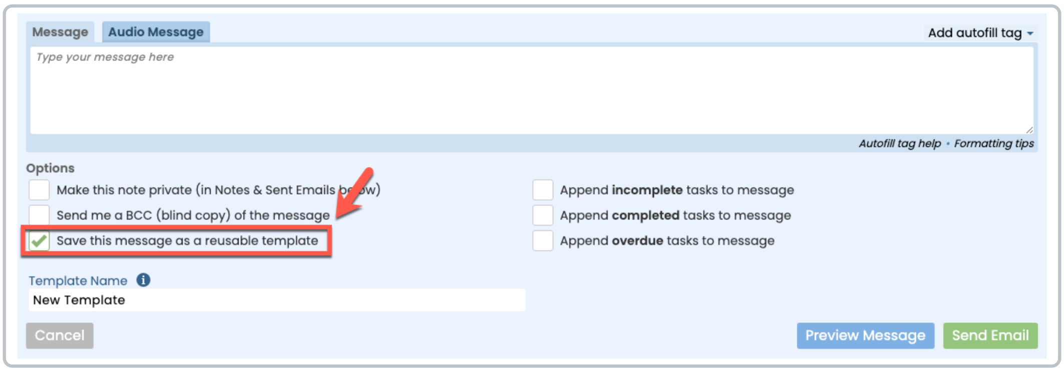
Save Message as a Reusable Template

Reusable message templates help you save time on messages you send frequently. Includeautofill 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].**

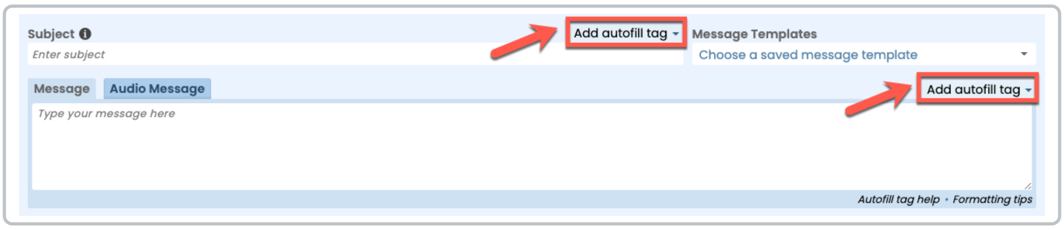


Use Autofill Tags

When you're saving your message as areusable 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.

To use autofill tags:

1 **To the right of the subject or message, select [Add autofill tag] and choose your desired fields.**



Reply to Messages Sent from Pipeline

Internal Recipients

Emails sent from Pipeline to internal recipients will smartly include the recipient's maildrop address so that when they reply, their messages will automatically sent back to the transaction. So 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