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View your company's shared *Reference* documents and links.

Who Can Do This? Agents and admins.

To view *Reference* docs and links:

1. **Go to the Reference page** by clicking [Reference] from the top menu.

2. **View the list of *Reference* docs and links** within each category.

   • Expand a *Reference* category by clicking [+] to the left of it. Whenever you return to the *Reference* page later, Pipeline will remember your last choice to expand or collapse a category.

   • View a *Reference* doc or link by clicking its name in the list.
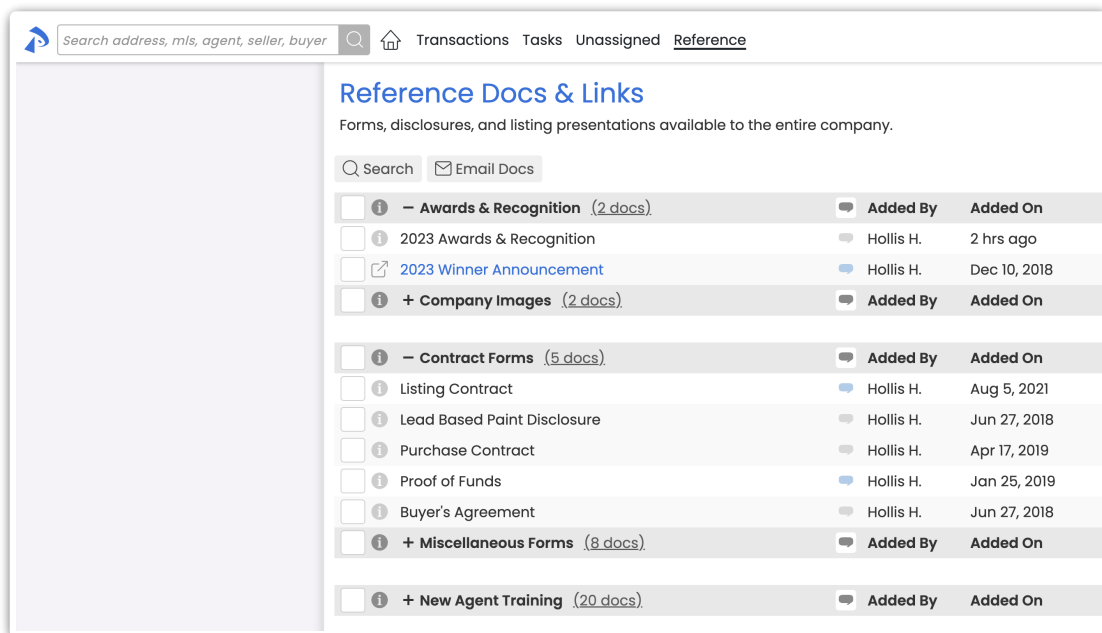
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2. **Click [⚙] to the right of a doc, then [Download]** The *Reference* doc will be downloaded to your device in its original file format (.pdf, .jpg, etc.).
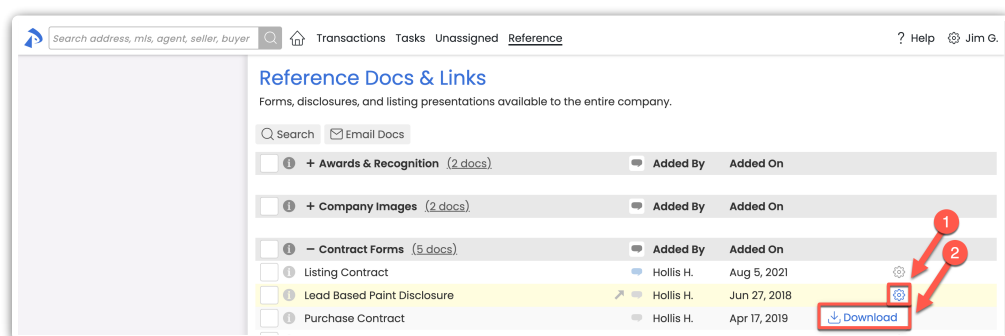
Once downloaded, the doc can be viewed on your device using an app that is compatible with the doc's file type.
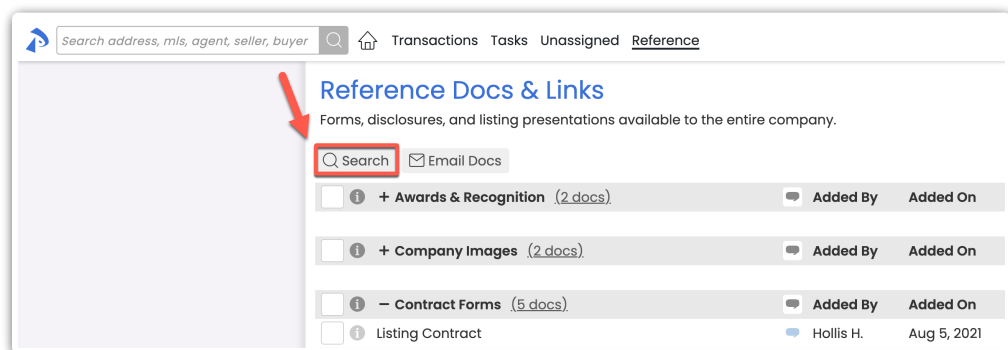
Search Reference Docs & Links

Search your company's shared resources on the *Reference* page for a specific form, disclosure, or other document or link.
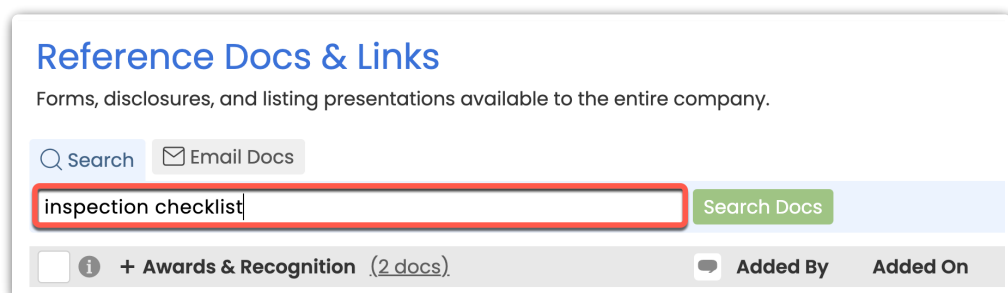
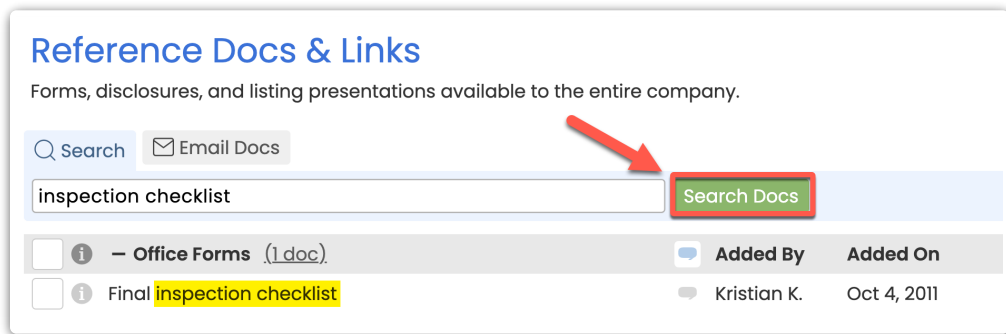To search for a *Reference* doc or link:

1 **Go to the Reference page** by clicking [Reference] from the top menu.

2 **Click [Search] at the top of the page.**

3 **Type the *Name* of the doc or link you're looking for.**

4 **Click [Search Docs].** The resulting list will show *Reference* docs or links matching the term you searched.
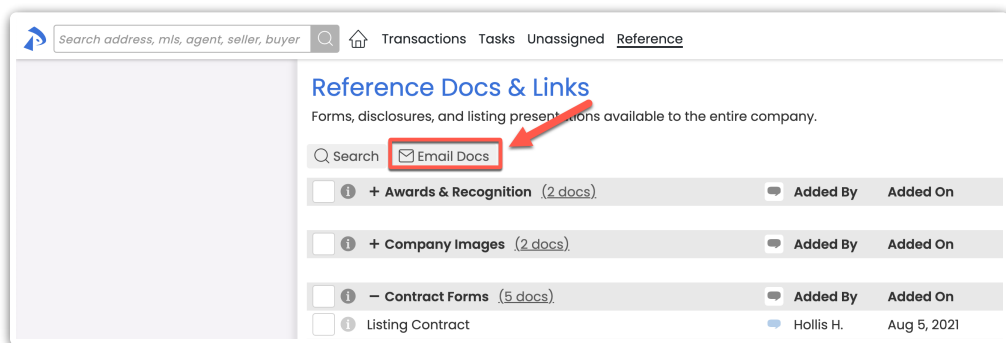
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Email your company's forms, disclosures, training materials, and other frequently used *Reference* documents and links.

Who Can Do This? Agents and admins.

To email *Reference* docs and links:

1. **Go to the Reference page** by clicking [Reference] from the top menu.

2. **Click [Email Docs] at the top of the page**

3. **Enter the *Email Address* of the person you want to send the *Reference* doc to.** If you associate the message with a specific transaction in a later step, you will also have the option to add *Agents*, *Contacts*, and *Staff* from the transaction as recipients.

Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

🔍 Search   ✉ Email Docs

Email Addresses

jam@paperlesspipeline.com   *Enter email address*

Subject

Please review the required docs.

Message

Type your email message here

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☐ Send these docs from a transaction

Cancel   Send Email

Attached Docs:

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

☐	ⓘ	**+ Awards & Recognition** (2 docs)	💬	Added By	Added On	
☐	ⓘ	**+ Company Images** (2 docs)	💬	Added By	Added On	
☐	ⓘ	**— Contract Forms** (5 docs)	💬	Added By	Added On	
☐	ⓘ	Listing Contract	💬	Hollis H.	Aug 5, 2021	⚙

④ Optionally, enter a *Subject* and *Message.*

🔍 Search   ✉ Email Docs

Email Addresses

jam@paperlesspipeline.com   *Enter email address*

Subject

Please review the required docs.

Message

Hi M,

I've attached the required docs.

Please review them as you have the time.

Thanks :)
Hollis

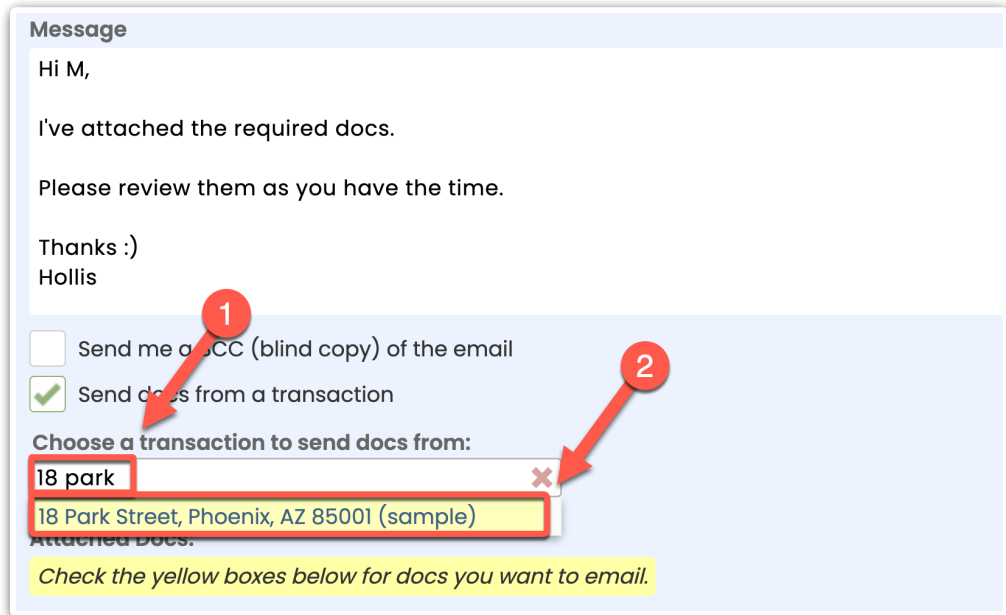☐ Send me a BCC (blind copy) of the email

☐ Send these docs from a transaction

Cancel   Send Email

Attached Docs:

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

⑤ Optionally, check the option to [Send me a BCC (blind copy) of the email].

6 Optionally, send the *Reference* docs / links from a transaction:

When you send Reference docs or links from a transaction, the message and any docs or links will be recorded in the transaction's *Notes & Sent Emails* and *Transaction History*. Learn more →

• Check the box next to [Send these docs from a transaction].

• Start typing the *Transaction Name* in the [Choose a transaction to send docs from] area, then select the transaction when it appears in the list.

• Choose any *Contacts*, *Agents*, or *Staff* from the transaction to include as recipients, then click [Done].

7 Check the boxes to the left of your desired docs or links.

Message

Please review them as you have the time.

Thanks :)
Hollis

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

✅ Send docs from a transaction
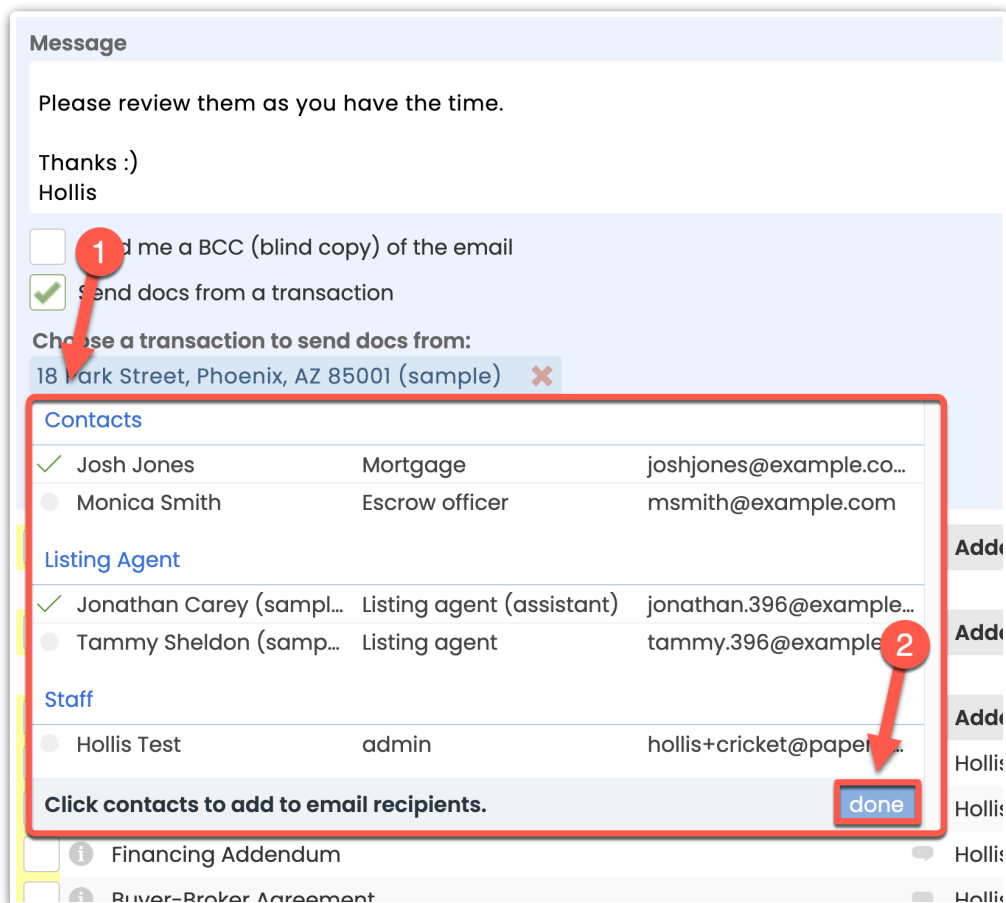
Choose a transaction to send docs from:

18 Park Street, Phoenix, AZ 85001 (sample) ✖

Attached Docs:
Listing Agreement   0.1 MB
Purchase Contract   0.1 MB
Financing Addendum   0.1 MB
Buyer-Broker Agreement   0.1 MB
Addendum (if needed)   0.1 MB

☐ ⓘ	**+ Optional Buyer Docs** (3 docs) ✎	💬 Added By
☐ ⓘ	**+ Optional Seller Docs** (1 doc) ✎	💬 Added By
✅ ⓘ	**− Required Docs** (5 docs) ✎	💬 Added By
✅ ⓘ	Purchase Contract	💬 Hollis T.
✅ ⓘ	Listing Agreement	💬 Hollis T.
✅ ⓘ	Financing Addendum	💬 Hollis T.
✅ ⓘ	Buyer-Broker Agreement	💬 Hollis T.
✅ ⓘ	Addendum (if needed)	💬 Hollis T.

8 **Click [Send Email].** The message and attached *Reference* docs and links will be sent to your included recipients.

Example of an email sent from *Reference*