

# Use Your Reference Library

The Reference Library is your company's shared space for the most used documents and links. It gives you quick, reliable access to the information and resources you use every day.

## Introduction

The Reference Library is your go-to place for your company's frequently used forms, disclosures, training materials, and other essential documents and links. It gives you instant access to the resources you need most.

Your Reference Library is always within reach. It's accessible from the main Reference page or directly within transactions, so whether you're prepping for a deal or in the middle of one, the right docs are never more than a few clicks away.

View Reference items, search by name, download what you need, or email docs and links to clients and teammates, all in just a few clicks.

## View Your Reference Library

Visit your company's Reference Library to instantly access the resources you rely on every day.

**Who Can Do This:** Anyone.

To view your company's Reference Library:

### Access the Reference Library

- Go to [Reference](#) by clicking [Reference] from the top menu.
- Or, open a transaction, and scroll down to the *Reference Docs* section.

### Browse Reference Docs & Links

- **On the Reference Page:**  
See your company's shared docs and links.

### Reference Docs & Links

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

Search [ ] Email Docs [ ] Send for Signature [ ] Add Link [ ] Add Docs [ ] Delete Docs [ ]

- + For Buyers (10 docs)**
  - Added By: Hollis A. | Added On: Apr 15, 2025
- For Sellers (11 docs)**
  - Listing Agreement (Apr 15, 2025)
  - Sellers Agency Disclosure (Apr 16, 2025)
  - Sellers Property Disclosure Statement (SPDS) (Apr 16, 2025)
  - Lead Based Paint Disclosure (Apr 16, 2025)
  - Affiliated Business Disclosure (Apr 16, 2025)
  - Counter Offer Form (Apr 16, 2025)
  - Repair Request for Repairs Response (Apr 16, 2025)
  - Commission Agreement Between Brokers (Apr 16, 2025)
  - Wire Fraud Warning Disclosure (Apr 16, 2025)
  - Escrow Instructions Form (Apr 16, 2025)
  - Market Conditions Advisory (Apr 16, 2025)
- + Tools (17 docs)**
- Training (5 docs)**
  - Agent Quick-Start Video (Dec 5, 2024)
  - Create a Transaction (Dec 5, 2024)
  - Assign a Doc to a Transaction (Dec 5, 2024)
  - Emailing Docs & Notes from Transactions (Dec 5, 2024)
  - More Agent Training Videos & Articles (Dec 5, 2024)

• **On Transactions:**

See your company's shared docs.

The screenshot shows a transaction page for '399 Forest Road'. On the left, there is a 'Checklists' section with a '+ 3/25' indicator. The main content area shows transaction details like 'List Price: \$792,114' and 'Listing Agents'. Below this is a 'Listing Docs' section with a table of documents including 'Appraisal Report', 'Initial Seller Consultation', 'Lead Based Paint Disclosure', 'Listing Agreement', 'Sellers Agency Disclosure', and 'Special Notes'. At the bottom, a 'Reference Docs' section is highlighted with a red box, showing a list of documents for buyers and sellers, including 'Listing Agreement', 'Sellers Agency Disclosure', 'Sellers Property Disclosure Statement (SPDS)', 'Lead Based Paint Disclosure', 'Affiliated Business Disclosure', 'Counter Offer Form', 'Repair Request for Repairs Response', 'Commission Agreement Between Brokers', 'Wire Fraud Warning Disclosure', 'Escrow Instructions Form', and 'Market Conditions Advisory'.

Expand a category by clicking [+ ] to the left of it. When you return later, Pipeline will smartly remember your choice and keep the category expanded or collapsed.

**Preview & Use Reference Items**

- To preview a doc or access a link, click its name.
- You can search the Reference Library, and download or email items (outlined below).

## Search Your Reference Library

Search your company's shared resources for a specific form, disclosure, or other document or link.

**Who Can Do This:** Anyone.

To find a specific reference item:

### Go to Reference

- Click [Reference] from the top menu.

### Search Reference Docs & Links

- Click [Search] at the top of the page.
- Type the *Name* of the doc or link you're looking for.

### Reference Docs & Links

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

### Confirm Search

- Click [Search Docs]. The resulting list will show reference items matching the term you searched.

## Download a Reference Doc

Download a document from your company's shared Reference Library.

**Who Can Do This:** Anyone.

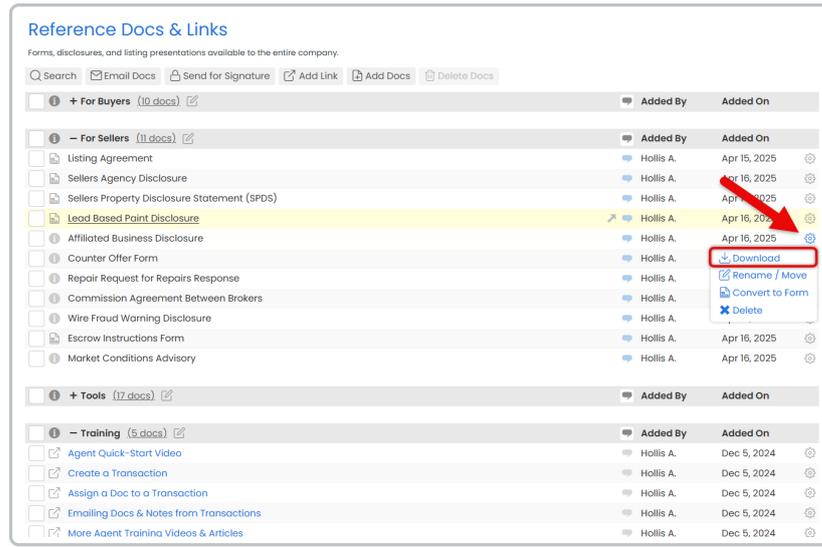
To download a reference doc:

### Access the Reference Library

- Go to [Reference](#) by clicking [Reference] from the top menu.
- Or, open a transaction, and scroll down to the *Reference Docs* section.

### Download Reference Doc

- Find the reference doc you want to download.
- Click [  ] to the right of the doc, then [Download]. It will save to your device in its original format and open in any compatible app.



## Email Reference Docs & Links from Reference

Email your company's forms, disclosures, training materials, and other frequently used documents and links.

**Who Can Do This:** Anyone.

To email reference docs or links:

### Go to Reference

- Click [Reference] from the top menu.

### Start the Email

- Click [Email Docs] at the top of the page.

### Add Recipients

- Enter the email address of the person you're sending to.

- If you associate the message with a specific transaction in a later step, you'll 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

Subject  
Please review the required docs.

Message  
Type your email message here

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.

<input type="checkbox"/>	+ Awards & Recognition (2 docs)	Added By	Added On
<input type="checkbox"/>	+ Company Images (2 docs)	Added By	Added On
<input type="checkbox"/>	- Contract Forms (5 docs)	Added By	Added On
<input type="checkbox"/>	Listing Contract	Hollis H.	Aug 5, 2021

### Enter a Subject and Message (Optional)

- Optionally, add a custom *Subject* and *Message*.

Search  Email Docs

Email Addresses  
jam@paperlesspipeline.com

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.

### BCC Yourself (Optional)

- If you want to send yourself a blind copy of the email, check the box next to [Send me a BCC (blind copy) of the email].

**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

**Attached Docs:**

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

### Send from a Transaction (Optional)

- To associate the email with a specific transaction and record it in the transaction's email history, check the box next to [Send these docs from a transaction].

**Message**

Aa B I ↔ ↻ ☰ ☷ 😊

Hi M,

I've attached the required docs.

Thanks :)  
Hollis

Send me a BCC (blind copy) of the email

Send these docs from a transaction

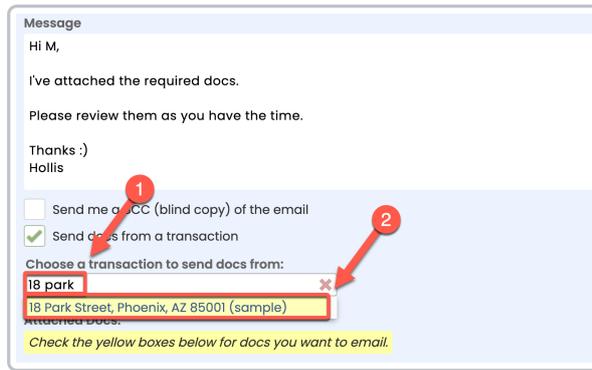
**Choose a transaction to send docs from:**

*type to search...* ✕

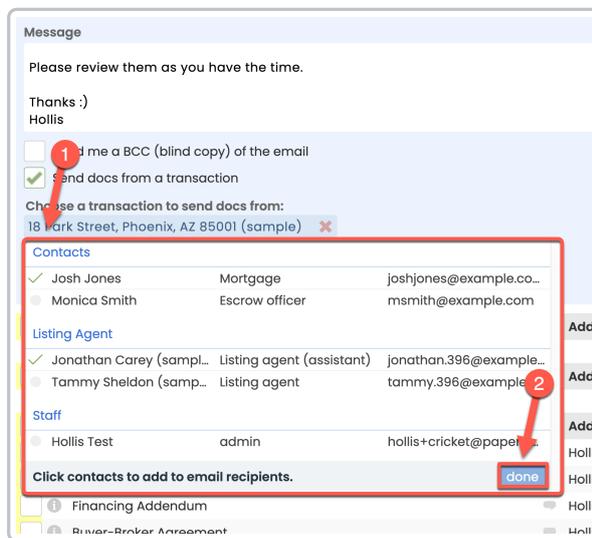
**Attached Docs:**

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

- Start typing the *Transaction Name* in the [Choose a transaction to send docs from] field, then select it from the list.



- Select any Contacts, Agents, or Staff from the transaction to include as recipients, then click [Done].



### Select Items to Send

- Check the boxes next to the Reference docs or links you want to include in the email.

**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*

	Added By
<input type="checkbox"/> + Optional Buyer Docs (3 docs) [edit]	Added By
<input type="checkbox"/> + Optional Seller Docs (1 doc) [edit]	Added By
<input checked="" type="checkbox"/> - Required Docs (5 docs) [edit]	Added By
<input checked="" type="checkbox"/> 1 Purchase Contract	Hollis T.
<input checked="" type="checkbox"/> 1 Listing Agreement	Hollis T.
<input checked="" type="checkbox"/> 1 Financing Addendum	Hollis T.
<input checked="" type="checkbox"/> 1 Buyer-Broker Agreement	Hollis T.
<input checked="" type="checkbox"/> 1 Addendum (if needed)	Hollis T.

### Send the Email

- Click [Send Email]. Your message and selected reference items will be delivered to all recipients.
- If associated with a transaction, the email will also be recorded in the transaction's history.

## Email Reference Docs from Transactions

You can email Reference docs directly from a transaction, just like transaction docs, coversheets, or other details.

**Learn how to [Email Docs & Notes from Transactions](#)**