

Messaging on Transactions

Sending notes and emails from the transaction keeps all your communication in one place, tied directly to the transaction. Whether you're sharing updates with your team, emailing clients, or replying to messages, everything stays connected to the deal.

Introduction

Every transaction in Paperless Pipeline gives you a dedicated space to manage communication so messages stay organized, available, and tied to the deal they belong to.

How It Works

One Place to Talk About the Deal

Each transaction gives you a central place to communicate. It's where you add notes, send emails, reply to messages, and keep everything tied to what's happening with that transaction.

Messages don't get lost. They're logged automatically in the Notes & Sent Emails section and recorded in the transaction history. You don't have to remember to track them — the system does that for you.

Messages Adapt to Recipients

Pipeline knows who you're messaging and formats things accordingly.

If you're emailing someone on your team, they'll get a message that links back to the transaction and includes their personal maildrop address (which only they can see). They can reply right from the transaction or from their inbox — either way, it logs back in.

If you're messaging someone outside of Pipeline, they'll get a clean, straightforward message without any internal extras.

You don't need to tweak anything, Pipeline just handles it.

Everyone Sees What's Relevant

Messages sent from a transaction are visible to everyone on the transaction, unless they're marked as private.

Messages that are emailed into a transaction via maildrop are more limited. Admins can see all incoming messages while Agents and team members can see the messages they personally sent in.

This keeps things clean and makes sure people only see what's actually relevant to them.

Everything Stays Together

Replies, document comments, back-and-forths, they all stay linked to the transaction. One ongoing thread, always in the right place. No messy email chains. No scattered conversations.

You don't have to organize anything manually, it all stays tidy on its own.

View Messages

View notes added and emails sent or received for the transaction, so you can stay informed and keep track of communication.

Who Can Do This: Anyone can view messages sent from a transaction. Admins see all received emails; agents see only their own.

Notes & Sent Emails

To view a transaction's notes and sent emails:

Go to a Transaction

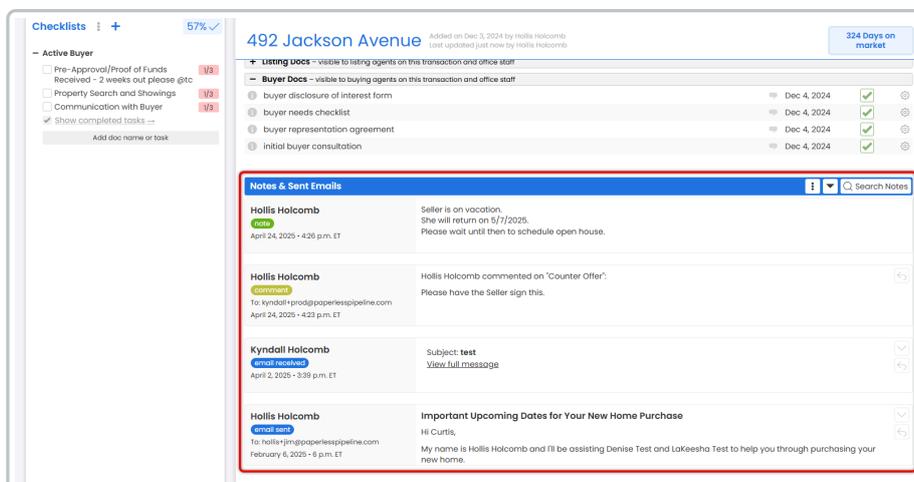
- Open the transaction you want to view messages for.

Access Notes & Sent Emails

- Scroll down to the *Notes & Sent Emails* area.

View the List

- See all notes and sent emails for this transaction.
- Use the action menu at the top right of *Notes & Sent Emails* to access additional options:
 - To show timestamps, click [] and check [Show timestamps].
 - To expand all notes, click [].
 - Use to find notes by content or date.



The screenshot displays a transaction page for "492 Jackson Avenue". On the left, there is a "Checklists" section with a progress indicator of 57%. Below it, a list of tasks is shown, including "Pre-Approval/Proof of Funds Received - 2 weeks out please gift", "Property Search and Showings", and "Communication with Buyer". The main content area is titled "492 Jackson Avenue" and includes a "Listing Docs" table with columns for document name, date, and status. Below the table, the "Notes & Sent Emails" section is visible, containing several messages from Hollis Holcomb and Kyndall Holcomb. The messages include a vacation notice, a comment about a counter offer, and an email about upcoming dates for a home purchase. The "Notes & Sent Emails" section is highlighted with a red border.

View an Individual Message

- View each message in the list.
- To view the full message, click [] next to the item you want to expand.



Received Emails

To view a transaction's received emails:

Go to a Transaction

- Open the transaction you want to view messages for.

Access Received Emails

- Click [Received Emails]. The number displayed next to *Received Emails* shows how many emails have been received for this transaction.

View the List

- See emails sent to the transaction.

Received Emails for ● **969 Oakmound Road (#3)** 2 emails

Email docs and notes to this transaction: 2308-269308-TX-6041311@docs.paperlesspipeline.com 

Agents are only shown their own emails. Admins are shown all emails.

Sender	Email Address	Subject	Date	Attached
Kyndall H.	kyndall+prod@paperlesspipeline.com	Check 123	Aug 16, 2024	
Kyndall H.	kyndall+prod@paperlesspipeline.com	Hi Hello	Aug 9, 2024	 1

View an Individual Received Message

- Click a message to open and view it.
- If an email includes an attachment, a paperclip icon will appear in the *Attached* column next to the number of attached files.

Received Emails for ● 969 Oakmound Road (#3) 2 emails

Email docs and notes to this transaction: 2308-269308-TX-6041311@docs.paperlesspipeline.com [A5](#)

Agents are only shown their own emails. Admins are shown all emails.

Sender	Email Address	Subject	Date	Attached
Kyndall H.	kyndall+prod@paperlesspipeline.com	Check 123	Aug 16, 2024	
Kyndall H.	kyndall+prod@paperlesspipeline.com	Hi Hello	Aug 9, 2024	 1

 CPC_Broker_Commission_Request_Form_v2_1.pdf 

Sender: Kyndall Holcomb
Sent from: kyndall@paperlesspipeline.com
Subject: Hi Hello
Received on: August 9, 2024 at 11:12 a.m. ET



Add an Internal Note

Add an internal note to record important details on the transaction when it's not necessary to notify others.

Who Can Do This: Anyone.

To add a note to a transaction:

Access the Note / Email Area

- Go to transaction.
- Scroll down

Add a Subject and Message

- Subject
- Message

Make This Note Private (Optional)

- Check option to

Save the Note

- Add the note.

Send or Schedule an Email from a Transaction

To send or schedule an email from a transaction:

Go to a Transaction

- Open a transaction.

Start an Email

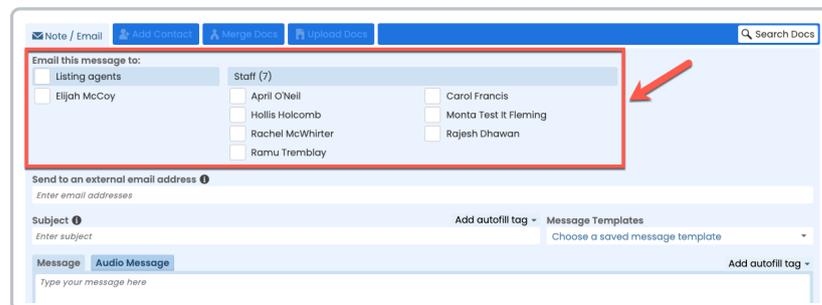
- Scroll down the page and click [Note / Email].

Specify Recipients

- Select your desired recipients (outlined below).

Agents & Staff

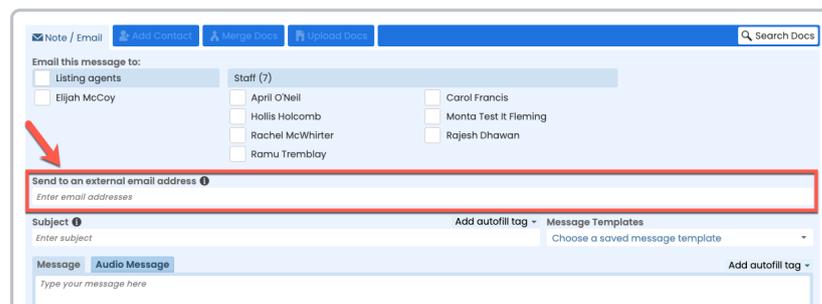
To include agents and staff, click the checkbox to the left of their name.



The screenshot shows the 'Note / Email' interface. At the top, there are buttons for 'Add Contact', 'Merge Docs', and 'Upload Docs', along with a 'Search Docs' search bar. Below this is the 'Email this message to:' section, which is divided into two columns: 'Listing agents' and 'Staff (7)'. The 'Listing agents' column contains a checkbox next to 'Elijah McCoy'. The 'Staff (7)' column contains checkboxes next to 'April O'Neil', 'Hollis Holcomb', 'Rachel McWhirter', 'Ramu Tremblay', 'Carol Francis', 'Monta Test It Fleming', and 'Rajesh Dhawan'. A red box highlights the entire 'Email this message to:' section, and a red arrow points to the 'Staff (7)' column. Below this section is the 'Send to an external email address' field, followed by the 'Subject' field, 'Add autofill tag', and 'Message Templates' dropdown. At the bottom, there are tabs for 'Message' and 'Audio Message', and an 'Add autofill tag' button.

Outside Contacts

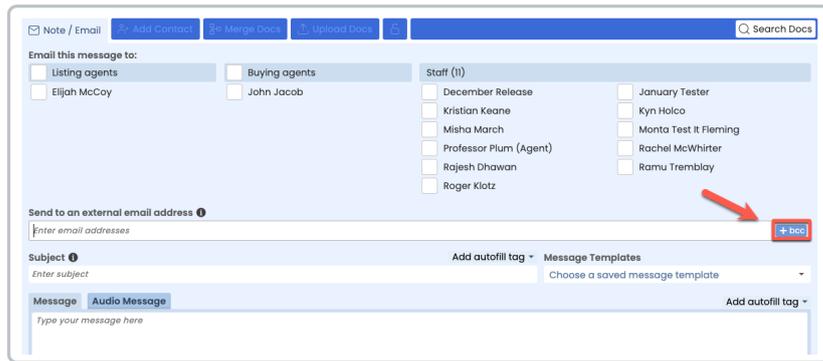
To include outside contacts, drag and drop the *Contact* into the *External Email Address* area, or type their email address(es).



The screenshot shows the 'Note / Email' interface, similar to the previous one. The 'Email this message to:' section is visible, but the focus is on the 'Send to an external email address' field, which is highlighted with a red box. A red arrow points to this field. Below this field are the 'Subject' field, 'Add autofill tag', and 'Message Templates' dropdown. At the bottom, there are tabs for 'Message' and 'Audio Message', and an 'Add autofill tag' button.

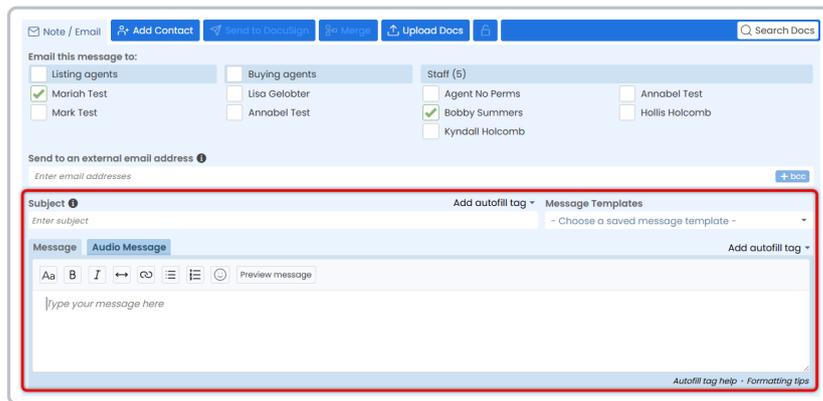
BCC Someone

To blind copy someone, click [+ BCC], then drag and drop the *Contact* into the *BCC* area, or type their email address(es).



Add a Subject & Message

- Enter a *Subject*. Pipeline will automatically add the *Transaction Name or Property Address* to the end. If you leave it blank, the subject will be the *Transaction Name or Property Address* by itself.
- Enter a *Message*.



Select Message Options

- Optionally, select your desired message settings (outlined below).

Options

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

Send me a BCC (blind copy) of the message

Append **incomplete** tasks to message

Append **overdue** tasks to message

Save this message as a reusable template

Include my signature ▼

Make The Note Private

Click [Make this note private].

BCC Yourself

Click [Send me a BCC].

Save As a Reusable Template

Click [Save this message as a reusable template].

Use Alternate Email Signatures

Use an [alternate email signature](#) to either include an agent's signature when sending a message on their behalf, or to exclude a signature altogether when sending an unbranded email.

Append Tasks

Append **incomplete**, **completed**, or **overdue tasks**.

Attach Docs

- Optionally, add docs as attachments (outlined below).

The screenshot shows the 'Attached Docs' interface. At the top, there are two checkboxes: 'Send docs as zip file link' and 'Attach this transaction's coversheet'. Below these is a yellow highlighted instruction: 'Check the yellow boxes of docs to attach below.' The main area is divided into three sections:

- Listing Docs** - visible to listing agents on this transaction and office staff. This section contains two items: 'Listing Agreement' (added Dec 8, 2024, reviewed) and 'Sellers Agency Disclosure' (added Dec 11, 2024, reviewed).
- Reference Docs** - This section is currently collapsed.
- For Buyers** - This section is expanded and contains a list of documents with their respective dates and review status: 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), and Market Conditions Advisory (Apr 16, 2025).

Transaction Docs

Use the *Docs* list to select docs uploaded to the transaction.

Reference Docs

Use the *Reference Docs* list to select docs from your Reference Library.

Zip File Link

To send the attached docs as a single Zip File package, select [Send Docs as Zip File Link].

Coversheet

To include the transaction's coversheet as an attachment, select [Attach this transaction's coversheet].

Optionally, select [Include contacts in this coversheet] to include the transaction's contacts with the coversheet.

Send Email

- When it's ready to go, send the message now or schedule for later (outlined below).

Send Now

Click [Send Email] to send it now.

Schedule for Later

To schedule it to send later, click the [✓] next to *Send Email*, then select [Schedule Send].

After that, choose either:

- [Absolute Date] to set a specific date and time.
- Or, [Relative Date] to send based on a transaction milestone.

Send an Email to a Transaction

To send an email to a transaction:

Reply to a Message

Reply to messages on the transaction, including emails sent, emails received and doc comments.

Who Can Do This: Anyone.

Reply in Pipeline

To reply to a message on a transaction:

Go to a Transaction

Access Notes & Sent Emails

Start Reply

- Click [↩] to open the reply.

Continue Sending

- Continue sending the email (as described above).

Reply Outside of Pipeline

To reply to a message outside of Pipeline:

Open the Email

- Open the message in your email inbox.

Start Reply

Select Recipients

- To