

What's New (April 27, 2025)

Send Reference Docs Directly from Transactions

Save time and steps by attaching Reference documents directly to messages you send from transactions. It's a fast, natural way to share the docs your team uses everyday, right from where you're already working.

Just like everything else you send from a transaction, these messages are automatically tracked in the transaction's history and Notes & Sent Emails, keeping all communication in one place.

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

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

Attached Docs

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

Check the yellow boxes of docs to attach below.

Document Name	Added On	Reviewed
Listing Docs - visible to listing agents on this transaction and office staff		
<input type="checkbox"/> Listing Agreement	Feb 24, 2025	✓
<input type="checkbox"/> Sellers Property Disclosure	Feb 24, 2025	✓
Sale Docs - visible to listing and buying agents on this transaction and office staff		
<input type="checkbox"/> Earnest Money Deposit	Apr 23, 2025	✓
<input type="checkbox"/> Lead-Based Point Disclosure	Apr 23, 2025	✓
<input type="checkbox"/> Sample Purchase Contract	Apr 22, 2025	
Reference Docs		
Optional Buyer Docs		
<input type="checkbox"/> Buyer's Estimate Net Sheet	1 min ago	
<input type="checkbox"/> Buyer's Checklist	1 min ago	
<input type="checkbox"/> Downsizing Buyer Checklist	1 min ago	
Optional Seller Docs		
<input type="checkbox"/> Listing Checklist for Clients	1 min ago	
Required Docs		
<input type="checkbox"/> Purchase Contract	1 min ago	
<input type="checkbox"/> Listing Agreement	1 min ago	
<input type="checkbox"/> Financing Addendum	1 min ago	
<input type="checkbox"/> Buyer-Broker Agreement	1 min ago	
<input type="checkbox"/> Addendum (if needed)	1 min ago	

Notes & Sent Emails

Jane Doe (sample user) **Missing Signature**

The seller's initials are missing on page 8 of the purchase contract. Can you resubmit page 8?

☑ **Next up:** Sending Reference docs from transactions is a precursor to the exciting launch of Pipeline eSign, our upcoming built-in forms and digital signing platform.

☑ **Want early access to Pipeline eSign?** Reply to this message and we'll reach out with more information.