Notes

Record and track important communication directly on a transaction. Use notes to capture updates, reminders, and conversations so everyone involved stays informed.

Introduction

Transaction notes keep all communication tied to a deal in one place. Use notes to document internal updates, log phone calls, or share information with teammates.

Notes are stored in the **Notes & Sent Emails** section at the bottom of each transaction for quick reference.

How It Works

Notes live directly on a transaction and are visible to everyone with access, unless marked private. Each note shows who created it and when, keeping a clear record of communication.

View Notes

View notes for past communication tied to a transaction in one place.

Who Can Do This: Admins can view all notes on a transaction. Agents added to a transaction can view all notes except those marked Private. Private notes are visible only to the agent who wrote them and to admins

To view a transaction's notes:

Go to the Transaction

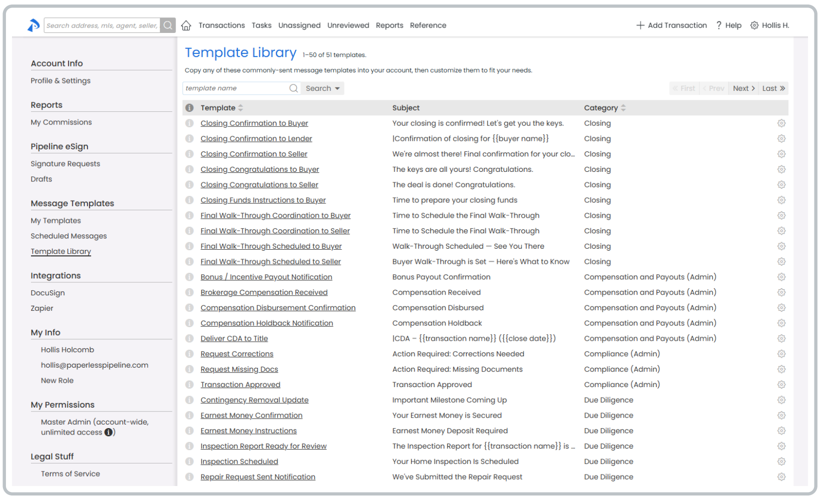
- Open the transaction where you need to take action.

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Add a Note

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

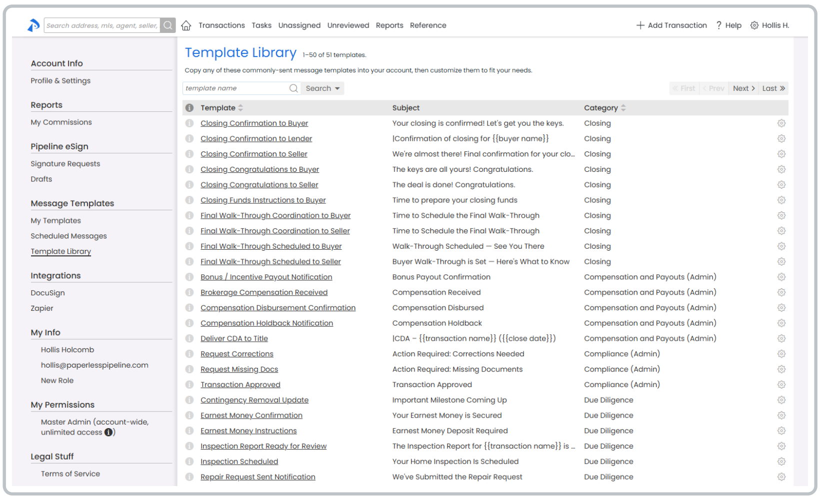
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Reply to a Note

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

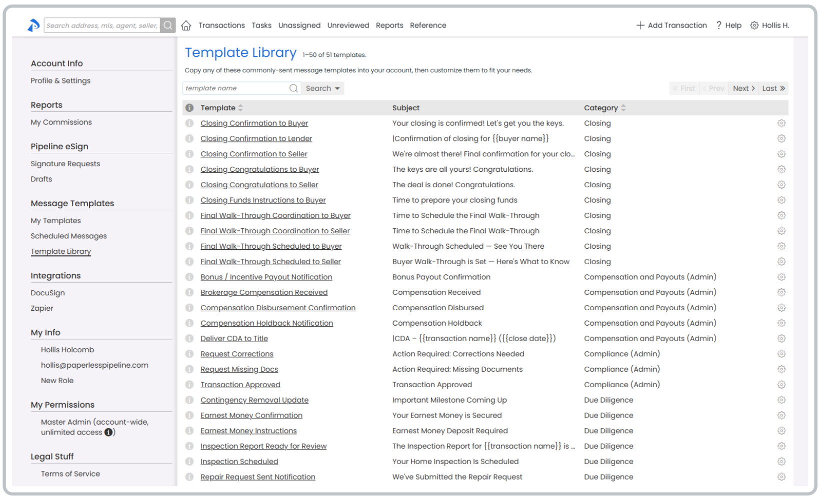
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Delete a Note

Explore the collection of pre-built templates available for your team. The library is the starting point for finding new messages that you can add to your office's personal collection.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

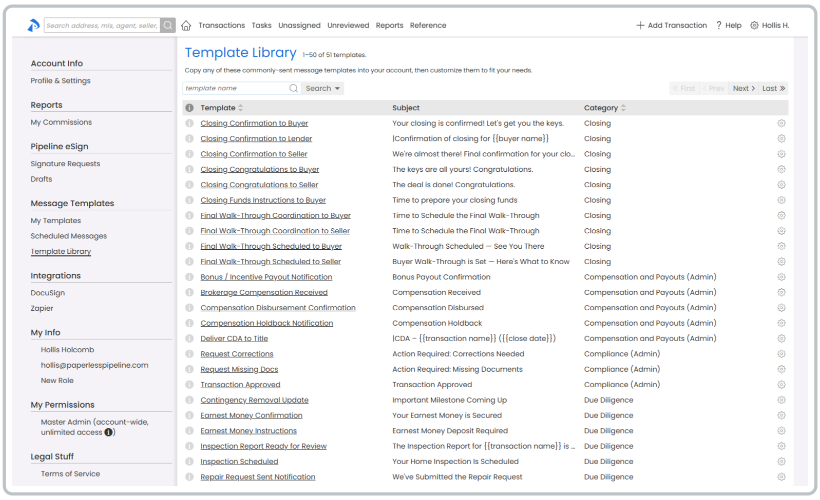
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Browse the full collection of professional, ready-made templates.



Send Emails

Explore the Message Template Library to access a wide range of prebuilt message templates for client communication, agent updates, task reminders, and transaction messages.

Who Can Do This: Anyone can view the library. Some templates are restricted to admins only.

To view the Message Template Library:

Go to My Info

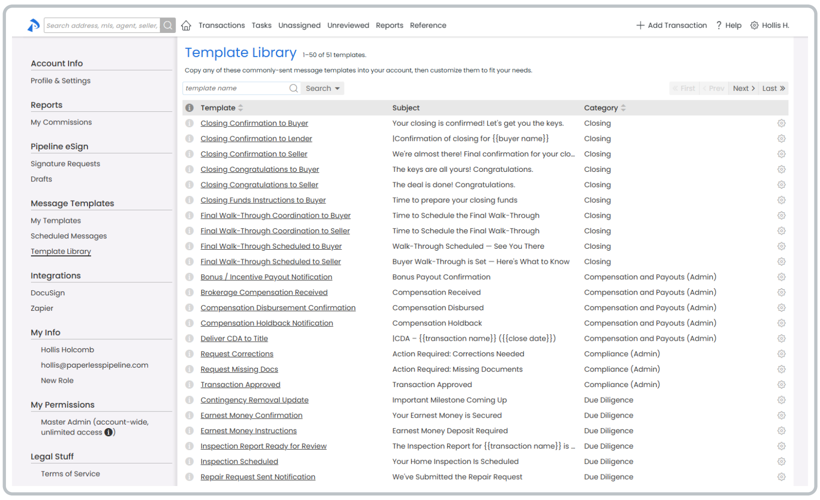
- Click your name in the upper right corner, then [My Info].

Open the Template Library

- Click [Template Library] from the *Message Templates* section of the left menu.

Browse Templates

- Explore the full collection of ready-to-use message templates.



Search address, mls, agent, seller,
Transactions Tasks Unassigned Unreviewed Reports Reference
Add Transaction
Help
Hollis H.
Account Info
Profile & Settings
Reports
My Commissions
Pipeline eSign
Signature Requests
Drafts
Message Templates
My Templates
Scheduled Messages
Template Library
Integrations
DocuSign
Zapier
My Info
Hollis Holcomb
hollis@paperlesspipeline.com
New Role
My Permissions
Master Admin (account-wide, unlimited access)
Legal Stuff
Terms of Service
Template Library
1–50 of 51 templates.
Copy any of these commonly-sent message templates into your account, then customize them to fit your needs.
template name
Search
First
Prev
Next
Last
Template Subject Category
Closing Confirmation to Buyer Your closing is confirmed! Let's get you the keys. Closing
Closing Confirmation to Lender |Confirmation of closing for {{buyer name}} Closing
Closing Confirmation to Seller We're almost there! Final confirmation for your clo… Closing
Closing Congratulations to Buyer The keys are all yours! Congratulations. Closing
Closing Congratulations to Seller The deal is done! Congratulations. Closing
Closing Funds Instructions to Buyer Time to prepare your closing funds Closing
Final Walk-Through Coordination to Buyer Time to Schedule the Final Walk-Through Closing
Final Walk-Through Coordination to Seller Time to Schedule the Final Walk-Through Closing
Final Walk-Through Scheduled to Buyer Walk-Through Scheduled — See You There Closing
Final Walk-Through Scheduled to Seller Buyer Walk-Through is Set — Here's What to Know Closing
Bonus / Incentive Payout Notification Bonus Payout Confirmation Compensation and Payouts (Admin)
Brokerage Compensation Received Compensation Received Compensation and Payouts (Admin)
Compensation Disbursement Confirmation Compensation Disbursed Compensation and Payouts (Admin)
Compensation Holdback Notification Compensation Holdback Compensation and Payouts (Admin)
Deliver CDA to Title |CDA – {{transaction name}} ({{close date}}) Compensation and Payouts (Admin)
Request Corrections Action Required: Corrections Needed Compliance (Admin)
Request Missing Docs Action Required: Missing Documents Compliance (Admin)
Transaction Approved Transaction Approved Compliance (Admin)
Contingency Removal Update Important Milestone Coming Up Due Diligence
Earnest Money Confirmation Your Earnest Money is Secured Due Diligence
Earnest Money Instructions Earnest Money Deposit Required Due Diligence
Inspection Report Ready for Review The Inspection Report for {{transaction name}} is … Due Diligence
Inspection Scheduled Your Home Inspection Is Scheduled Due Diligence
Repair Request Sent Notification We've Submitted the Repair Request Due Diligence