What's New (April 27, 2025)

Last Modified on 11/10/2026 12:29 pm EST

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.

 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.

See Composing an Email.