

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 →](#)

The screenshot displays the Pipeline software interface. On the left is a sidebar with a list of transactions and their dates. The main area shows a 'Send Email' dialog box. A red arrow points to the 'Reference Docs' section, which is highlighted with a red box. This section contains three categories of documents: 'Optional Buyer Docs', 'Optional Seller Docs', and 'Required Docs'. The 'Required Docs' category lists several documents, each with a checkbox and a '1 min ago' timestamp. Below the 'Reference Docs' section is the 'Notes & Sent Emails' section, which shows a message from Jane Doe (sample user) with a missing signature. The message text reads: 'The seller's initials are missing on page 8 of the purchase contract. Can you resubmit page 8?'

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

Notes & Sent Emails

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

[email sent](#)

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.