

Download and Use Reference Docs & Links

Your company may use the *Reference* page as a library for forms, disclosures, training materials, and other documents or links you and your team need to access frequently.

View, search, download, and email your company's *Reference* docs and links from the [Reference page](#).

View Reference Docs & Links

View your company's shared *Reference* documents and links.

Who Can Do This? Agents and admins.

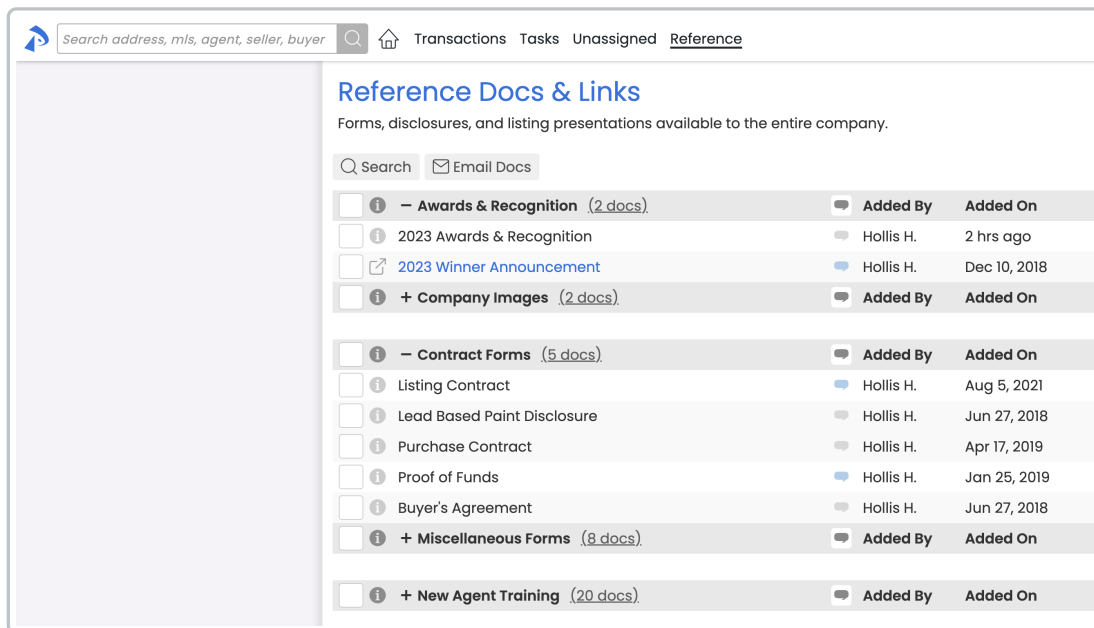
To view *Reference* docs and links:

1 Go to Your Reference Library

- Click [Reference] from the top menu.

2 View the list of *Reference* docs and links within each category.

- Expand a *Reference* category by clicking [+] to the left of it. Whenever you return to the *Reference* page later, Pipeline will remember your last choice to expand or collapse a category.
- View a *Reference* doc or link by clicking its name in the list.



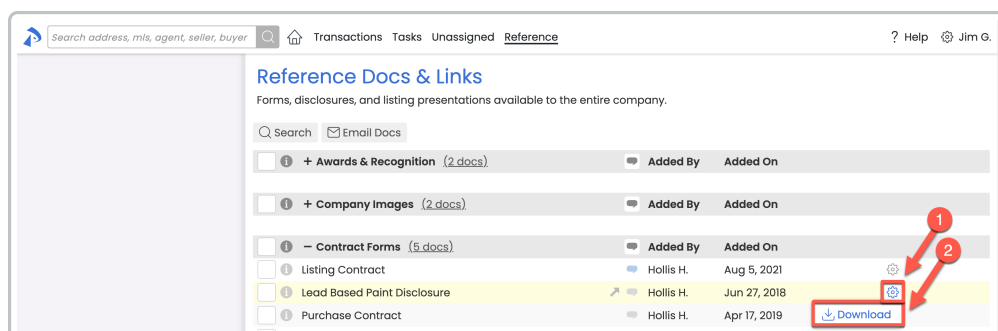
Download a Reference Doc

Download a doc from your company's *Reference* page.

Who Can Do This? Agents and admins.

To download a doc from the *Reference* page:

- Go to Your Reference Library**
 - Click [Reference] from the top menu.
- Click [⚙️] to the right of a doc, then [Download]** The *Reference* doc will be downloaded to your device in its original file format (.pdf, .jpg, etc.).



Once downloaded, the doc can be viewed on your device using an app that is compatible with the doc's file type.

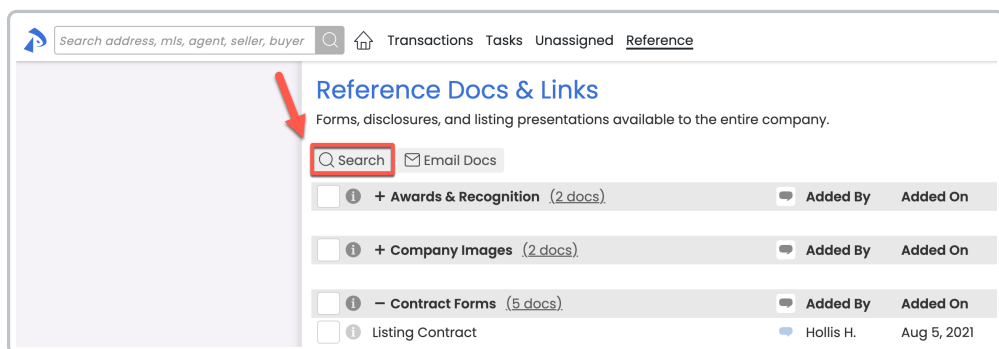
Search Reference Docs & Links

Search your company's shared resources on the *Reference* page for a specific form, disclosure, or other document or link.

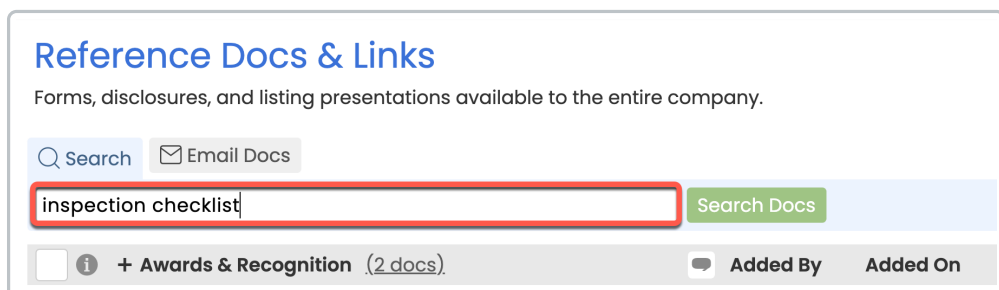
Who Can Do This? Agents and admins.

To search for a *Reference* doc or link:

- 1 **Go to Your Reference Library**
 - Click [Reference] from the top menu.
- 2 **Click [Search] at the top of the page**



- 3 **Type the *Name* of the doc or link you're looking for.**



- 4 **Click [Search Docs].** The resulting list will show *Reference* docs or links matching the term you searched.

Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

		Added By	Added On
☐ ⓘ	– Office Forms (1 doc)		
☐ ⓘ	Final inspection checklist	Kristian K.	Oct 4, 2011

Email Reference Docs & Links

Email your company's forms, disclosures, training materials, and other frequently used *Reference* documents and links.

Who Can Do This? Agents and admins.

To email *Reference* docs and links:

- Go to Your Reference Library**
 - Click [Reference] from the top menu.
- Click [Email Docs] at the top of the page**

[Transactions](#)
[Tasks](#)
[Unassigned](#)
[Reference](#)

Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

		Added By	Added On
☐ ⓘ	+ Awards & Recognition (2 docs)		
☐ ⓘ	+ Company Images (2 docs)		
☐ ⓘ	– Contract Forms (5 docs)		
☐ ⓘ	Listing Contract	Hollis H.	Aug 5, 2021

- Enter the *Email Address* of the person you want to send the *Reference* doc to.** If you associate the message with a specific transaction in a later step, you will also have the option to add *Agents*, *Contacts*, and *Staff* from the transaction as recipients.

Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

Search Email Docs

Email Addresses

jam@paperlesspipeline.com Enter email address

Subject

Please review the required docs.

Message

Type your email message here

☐ Send me a BCC (blind copy) of the email

☐ Send these docs from a transaction

Cancel Send Email

Attached Docs:

Check the yellow boxes below for docs you want to email.

	Added By	Added On
☐ + Awards & Recognition (2 docs)		
☐ + Company Images (2 docs)		
☐ - Contract Forms (5 docs)		
☐ Listing Contract	Hollis H.	Aug 5, 2021

4 Optionally, enter a *Subject* and *Message*.

Search Email Docs

Email Addresses

jam@paperlesspipeline.com Enter email address

Subject

Please review the required docs.

Message

Hi M,

I've attached the required docs.

Please review them as you have the time.

Thanks :)

Hollis

☐ Send me a BCC (blind copy) of the email

☐ Send these docs from a transaction

Cancel Send Email

Attached Docs:

Check the yellow boxes below for docs you want to email.

5 Optionally, check the option to [Send me a BCC (blind copy) of the email].

Message

Hi M,

I've attached the required docs.

Please review them as you have the time.

Thanks :)
Hollis

☒ Send me a BCC (blind copy) of the email
☐ Send these docs from a transaction

Attached Docs:

Check the yellow boxes below for docs you want to email.

- 6 Optionally, send the *Reference* docs / links from a transaction:

When you send Reference docs or links from a transaction, the message and any docs or links will be recorded in the transaction's *Notes & Sent Emails* and *Transaction History*. [Learn more →](#)

- Check the box next to [Send these docs from a transaction].

Message

Hi M,

I've attached the required docs.

Please review them as you have the time.

Thanks :)
Hollis

☐ Send me a BCC (blind copy) of the email
☒ Send these docs from a transaction

Choose a transaction to send docs from:

Attached Docs:

Check the yellow boxes below for docs you want to email.

- Start typing the *Transaction Name* in the [Choose a transaction to send docs from] area, then select the transaction when it appears in the list.

Message

Hi M,

I've attached the required docs.

Please review them as you have the time.

Thanks :)

Hollis

☐ Send me a BCC (blind copy) of the email

☒ Send docs from a transaction

Choose a transaction to send docs from:

18 park

18 Park Street, Phoenix, AZ 85001 (sample)

Attached Docs:

Check the yellow boxes below for docs you want to email.

- Choose any *Contacts*, *Agents*, or *Staff* from the transaction to include as recipients, then click [Done].

Message

Please review them as you have the time.

Thanks :)

Hollis

☐ Send me a BCC (blind copy) of the email

☒ Send docs from a transaction

Choose a transaction to send docs from:

18 Park Street, Phoenix, AZ 85001 (sample)

Contacts

☒	Josh Jones	Mortgage	joshjones@example.co...
☐	Monica Smith	Escrow officer	msmith@example.com

Listing Agent

☒	Jonathan Carey (sampl...	Listing agent (assistant)	jonathan.396@example...
☐	Tammy Sheldon (samp...	Listing agent	tammy.396@example...

Staff

☐	Hollis Test	admin	hollis+cricket@paper...
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Click contacts to add to email recipients.

done

Financing Addendum

Buyer-Broker Agreement

7 Check the boxes to the left of your desired docs or links.

Message

Please review them as you have the time.

Thanks :)
Hollis

☐ Send me a BCC (blind copy) of the email

☒ Send docs from a transaction

Choose a transaction to send docs from:
18 Park Street, Phoenix, AZ 85001 (sample) ✕

Attached Docs:
Listing Agreement 0.1 MB
Purchase Contract 0.1 MB
Financing Addendum 0.1 MB
Buyer-Broker Agreement 0.1 MB
Addendum (if needed) 0.1 MB

☐ ⓘ + Optional Buyer Docs (3 docs) ✎

Added By

☐ ⓘ + Optional Seller Docs (1 doc) ✎

Added By

☒ ⓘ - Required Docs (5 docs) ✎

Added By

☒ ⓘ Purchase Contract

Hollis T.

☒ ⓘ Listing Agreement

Hollis T.

☒ ⓘ Financing Addendum

Hollis T.

☒ ⓘ Buyer-Broker Agreement

Hollis T.

☒ ⓘ Addendum (if needed)

Hollis T.

8 Click [Send Email]. The message and attached *Reference* docs and links will be sent to your included recipients.

