Getting Your Documents In

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Every document you file gets there one of two ways: you upload it, or you email it. Both record it as coming from you.

Introduction

Pipeline identifies you by how a document arrives. Upload while signed in, or email it to your own maildrop address, and it is filed under your name either way.

Documents you email arrive in Unassigned first, which is the queue an admin works from. That is where to look when you want to know something landed.

1. Start From the Office's Own Forms

Your office's blank forms and disclosures sit on the Reference page, one copy for everyone. Take the form from there, and the signed copy is what you file back onto the deal.

The Reference page lists every doc and link your office has posted, grouped into categories — browse it, search it by name, and take what you need without leaving Pipeline.

See Reference List

2. Upload From Your Computer

Drag a whole stack in at once. If the upload area is greyed out on a transaction, that is a permission on the file rather than a problem with the document.

Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

See Uploading Docs

3. Email Documents In From Anywhere

Save your maildrop address as a contact called Pipeline Maildrop and it is there in your phone and your mail app. Attach the file itself, since a Drive or OneDrive link arrives as a link.

Email, forward or scan docs into Pipeline without logging in. Pipeline pulls the attachments into Unassigned, ready to file on the right transaction.

See Your Unassigned Maildrop Address

When you already know the deal, send to the transaction instead. Every transaction shows you an address of your own for it, and the email itself stays on the file.

Send or forward a message to the transaction it belongs to. Pipeline keeps the message on the file and sends its docs to Unassigned, already pointed at that transaction.

See Your Transaction Maildrop Address

4. See That It Arrived

Everything emailed in lands here before it reaches a transaction, carrying the subject line it came in under. It is the fastest way to confirm a send went through.

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

5. File It, or Leave It for Your Office

Assigning puts a doc on its transaction and sets who can open it. In many offices staff do this part. If you see an Assign button it is yours to do, and a blue one already knows which transaction it belongs to.

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See Doc Assignment

6. Know It Arrived Without Looking

Turn this on once in your profile and every email you send to your maildrop address gets a reply saying what uploaded and what was refused, and why.

Ask Pipeline to write back every time you email docs in, and you'll know what uploaded and what didn't without going to look.

See Email Acknowledgement