Send Outstanding Items to an Agent or a Client

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Pipeline can put a checklist straight into an email so you're not retyping what's still missing. Which way you do it depends entirely on whether the person receiving it logs into Pipeline.

Introduction

You're chasing paperwork. An agent still owes you three disclosures; a seller still owes you a signed addendum. The list already exists on the transaction — you want to send it, not rewrite it.

There are two ways to get checklist items into a Pipeline email, and they are not interchangeable. **Appending** pulls the incomplete tasks in for you, automatically, filtered to what that person is allowed to see. It only works for people inside your account. **Dragging** puts the tasks into the message body as text, which means they reach anybody with an email address.

So the first thing this job turns on isn't a button. It's who's on the other end.

When to Use This

- An agent is missing documents and you'd rather send them the list than type it out again.
- You checked **Append incomplete tasks to message**, sent it to a buyer or seller, and the email arrived with nothing under your note.
- You want a client to see what they still owe you before closing.
- Your agent received your internal admin checklist in an appended email and was never meant to see it.
- You send the same "here's what's outstanding" email every week and want it to build itself.

Why This Starts With Who's Receiving It

The instinct is to check **Append incomplete tasks to message** and hit send. That instinct is right — for agents, admins, coordinators, anyone with a Pipeline login. Send that same email to a buyer, a seller, a lender, or an outside coordinator, and the tasks quietly don't come through. Your note arrives with nothing under it. Nothing warns you, and the message doesn't look broken on your end.

That's not a glitch. Pipeline filters appended tasks against the recipient's role and permissions, so nobody ever gets a task they weren't meant to see. Someone outside your account has no role in Pipeline, so the filter leaves them with nothing. For them, the list has to travel as ordinary text in the message body — and that means dragging it in yourself.

1. Work Out Who's Actually Receiving It

Split your recipients into two groups, because the rest of this article follows the split.

Inside your account — agents, transaction coordinators, admins, anyone you can pick by name from the staff list on the message. You can append tasks for these people.

Outside your account — buyers, sellers, lenders, title, a co-op agent, an outside coordinator. You have to drag the tasks in for these people. Pipeline is built for your internal team and isn't designed to give clients logins of their own, so the email is how they hear from you.

> An internal person can accidentally land in the external group. If you type an agent's address into the **Send to an external email address** field instead of selecting them by name from the staff section, Pipeline treats it as an external send and appends nothing. Pick people by name whenever they're on your account.

2. Set Task Visibility Before Anything Goes Out

Appending doesn't send the whole checklist — it sends the part of the checklist that recipient is allowed to see. That cuts both ways, and both directions bite.

Tasks set to **Visible to Admins** don't appear in an agent's appended list, which is why a list can arrive looking half-empty. And an internal, administrative checklist left **Visible to Anyone** happily appends itself into an agent's email — the fix is to set those tasks to **Visible to Admins**, on the checklist template so it holds going forward, and on any transactions already in flight.

Get this right before you send, not after. Appending is only as safe as the visibility underneath it.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

3. Send an Agent the Tasks They Still Owe You

For anyone on your account, this is the whole job. Open **Note / Email** on the transaction, choose the person by name from the staff list, write your note, and check the option to append tasks to the message. Pipeline builds the list at send time and includes only the tasks that person can see.

You can append incomplete tasks, completed tasks, or overdue tasks, depending on what the email is for — what's still owed, what's been received, or what's late.

Each appended line carries its visibility in the text, reading something like *(visible to: Anyone)*. You can't turn that label off. It's there so the scoping is visible rather than silent.

> If what you really want is for agents to hear about their own overdue work every day without you sending anything, that already exists and needs no email from you.
>
> Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.
>
> See Daily Task Reminder Emails

4. Turn Off Sort by Date Before You Drag

Dragging individual tasks only works when **Sort by date** is switched off. If you have it on, turn it off in the checklist view menu, drag what you need, then turn it back on — it's a personal display setting, so changing it affects nobody else.

The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.

See Checklists Panel

5. Drag a Client the Items They Owe You

Open **Note / Email** on the transaction and drag what you want to send into the message body. Grab the checklist's title to bring the whole checklist across, or grab tasks one at a time to send just some of them. They land as text in the message, which is why they reach people who have no login.

Dragging task by task is also the only way to send a client their *outstanding* items specifically. You're the filter here — drag the ones still open and leave the finished ones behind. Nothing else in Pipeline narrows the list to what's incomplete for an outside recipient.

Tasks arrive laid out the way they look on the transaction, so any manual ordering you've done comes with them.

> Dragging into a message needs the *Fully manage checklists* permission, which most agents don't have — so this is generally an admin or coordinator's move. It also isn't available on the mobile interface; appending is the mobile option, which works only for internal recipients.

6. Set Up the Sends You Make Every Week

If it's the same email every Friday, save it as a reusable message template rather than rebuilding it. You can also schedule a message to go out later — an appended-task email builds its list when it sends, not when you write it, so a scheduled reminder reflects whatever is still incomplete on the day it lands.

Message templates can also pull a checklist in automatically using an advanced checklist autofill tag, and that route does reach external recipients. There's one limit worth knowing before you build around it: the tag pulls **every** task on the checklist regardless of whether it's been completed. There's no tag that filters down to incomplete items only. So a tag is a good way to send someone the checklist; it isn't a way to send them just what's outstanding.

> A checklist autofill tag matches the checklist's name character for character. Rename a checklist, or use a template across transactions whose checklists are named slightly differently, and the tag stops resolving. Either match the name exactly or name your checklists consistently enough that one tag works everywhere.