Reference List FAQ

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Reference docs are found by name, come down one at a time, and go out by email from either the Reference page or a transaction. Answers to the common questions about finding, downloading, printing, and sending your company's forms.

Where do I find my office's forms?

On the Reference page — click [Reference] from the top menu. Docs are grouped into categories; click [+] to the left of a category to expand it and see what's inside.

The form I need isn't on the Reference page. Now what?

Ask your admin — they decide what's posted there. Your company's admin contact info is on the Home page's left menu under **Admin & Support**.

What does Reference search match?

The name of the doc or link. Type what the file is called rather than a phrase from inside it.

What file format does a reference doc download in?

The one it was uploaded in. A PDF comes down as a `.pdf`, a photo as a `.jpg`. Open it with any app on your device that handles that file type.

Can I download everything in a category at once?

No — reference docs download individually. If you need several, grab them one after another.

Can I print straight from the Reference page?

No. Download the doc first, then print it from whatever app opens it.

Can I fill out a form inside Pipeline?

No — that part happens in your own PDF app. Download the blank form, complete it in a full PDF reader, save it, then upload the finished copy where it belongs.

Will a fillable PDF still be fillable after I download it?

Yes. If it opens flat, that's usually the viewer rather than the file — a browser's built-in PDF viewer often can't fill forms, while a full reader like Adobe Reader can.

Can I move a reference doc straight onto a transaction?

Not directly — download it, then upload that copy to the transaction. Emailing the doc to the transaction's maildrop address works too, and lands it on the *Unassigned* page ready to assign.

Who can download from the Reference page?

Anyone in your account. Agents and admins see the same docs and can download any of them. Putting docs there is the admin half of the job; taking them is open to everyone.

Can I send a blank office form without uploading it to the transaction first?

Yes — that's exactly what this is for. Attach the doc from the Reference Docs section of Note / Email, or send it from the Reference page and tie the message to the transaction. Either way, no blank form is left sitting in the transaction's document list.

Can I attach a file from my own computer to a Pipeline email?

No — the doc has to be in Pipeline first. Add it to the Reference page or to the transaction, then attach it from there. For a one-off that belongs in neither place, send it from your regular email program instead.

Why don't I see Reference Docs on my transaction?

They only appear while Note / Email is open. Reference docs aren't part of a transaction's own document list — open [Note / Email] and they're listed below Transaction Docs. If all you see is a gray [+ Reference Docs] header, click it to expand the list.

Does the email show up on the transaction?

Yes, whenever the message is tied to a transaction. The email lands in that transaction's Notes & Sent Emails, and both the message and each attached doc or link get their own entry in Transaction History.

Can I get the property address into the subject line automatically?

Send from within the transaction and leave the Subject blank. Pipeline fills in the Transaction Name for you. Sending from the Reference page doesn't do that, so type your own subject there.

Can I keep a copy of what I sent?

Yes — check [Send me a BCC (blind copy) of the email]. The copy arrives in your own inbox alongside the recipients' copies.

How many docs can I send in one message?

A normal batch is fine; a very large one won't go through. If a message with a lot of docs fails to arrive, split it into smaller sends, or download the docs and send them yourself.

Can I email a reference link, or only a doc?

Both. Links sit alongside docs on the Reference page and attach to a message the same way — check the box next to whichever ones you want to send.

Learn More

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

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.