Reference List

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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.

Introduction

An agent needs the current listing agreement and needs it now. The copy on their laptop is from March, the one in their email is from whenever somebody last forwarded it, and neither is the version your office wants signed.

The Reference page settles that. Your company's blank forms, disclosures, training material, and links all sit on one page, and it's the same page for everyone in the account, so the doc a colleague is reading is the doc you'll find. Nobody has to keep a personal copy of anything, which means nobody is working from a stale one.

From there, three things happen without downloading first: find a form, take a copy of it, or send it to whoever needs it. An agent who never posts a single document still lives on this page. And a form sent from here leaves a record, so the question of whether somebody was ever given it has an answer instead of an argument.

How It Works

Find What You Need

Click [Reference] from the top menu and the whole library opens, grouped into the categories your admins set up. Click **[+]** to expand one, and Pipeline leaves it the way you found it next time. Search matches the **Name** of a doc or link, and it covers this page only — search a transaction's docs from that transaction.

Take a Copy

Every item carries a **[⚙]** menu with **[Download]** in it, one doc at a time, in the format it went up in. Filling a form in and printing both happen after that, in whatever app opens the file: Pipeline stores the blank, your own PDF reader does the rest.

Send It Straight Out of Pipeline

Two entry points, and the difference is what gets recorded. **[Email Docs]** on the Reference page opens a full compose screen with a checkbox beside every doc and link. From inside a transaction, **Note / Email** already lists your reference docs below Transaction Docs — send from there and Pipeline writes both the message and each attachment to that transaction's **Notes & Sent Emails** and **Transaction History**, with no blank form left behind in its document list.

Search Reference Docs and Links

> Find a specific form, disclosure, doc, or link on the Reference page by name.

> **Who Can Do This**: Agents and admins.

To search for a reference doc or link:

1. 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 page lists the reference docs and links whose names match your term. Click a name to open it, or use its [⚙] menu to download it.

Download a Reference Doc

> Save a doc from your company's Reference page to your device in its original file format.

> **Who Can Do This**: Agents and admins.

To download a reference doc:

1. Click [Reference] from the top menu.
2. Click [+] to the left of the category the doc is in.
3. Click [⚙] to the right of the doc, then [Download].

The doc downloads to your device in its original file format — `.pdf`, `.jpg`, or whatever it was uploaded as. Open it with any app that handles that file type.

Email Reference Docs and Links

> Send any of your company's reference docs and links in one message, and optionally tie that message to a transaction.

> **Who Can Do This**: Agents and admins.

To email reference docs and links:

1. Click [Reference] from the top menu.
2. Click [Email Docs] at the top of the page.
3. Enter the **Email Address** of each person you want to send to.
4. Optionally, enter a **Subject** and **Message**.
5. Optionally, check [Send me a BCC (blind copy) of the email].
6. Optionally, tie the message to a transaction:
    a. Check [Send these docs from a transaction].
    b. Start typing the **Transaction Name**, then select the transaction when it appears in the list.
    c. Choose any **Contacts**, **Agents**, or **Staff** from that transaction to include as recipients, then click [Done].
7. Check the boxes to the left of the docs and links you want to send.
8. Click [Send Email].

Your recipients get the message with the docs and links attached. If you tied it to a transaction, Pipeline records the send in that transaction's Notes & Sent Emails and Transaction History.

Attach a Reference Doc to a Transaction Email

> Pull a doc from your company's Reference page into an email you're already writing on a transaction — no downloading, no uploading a blank copy first.

> **Who Can Do This**: Agents and admins.

To attach a reference doc to a transaction email:

1. Open the transaction, then open [Note / Email].

2. Click [+] to the left of **Reference Docs**, below Transaction Docs.

3. Check the box to the left of each doc you want to send.

4. Write your message and send it.

The docs go out attached to your email, and Pipeline logs the message in the transaction's Notes & Sent Emails and Transaction History — with no blank forms left behind in the transaction's own document list.

View a Sent Reference Email on a Transaction

> See a reference email you already sent from a transaction, along with everything that went with it.

> **Who Can Do This**: Agents and admins.

To view a sent reference email on a transaction:

1. Go to the transaction the email was sent from.

2. Scroll down to the **Notes & Sent Emails** section.

3. Find the sent **Reference Email** in the list.

You'll see the message that went out and the reference docs and links attached to it.

View a Sent Reference Email in Transaction History

> Trace a sent reference email through the transaction's audit record, down to the time each doc went out.

> **Who Can Do This**: Agents and admins.

To view the Transaction History record of a sent reference email:

1. Go to the transaction the email was sent from.

2. Click [Transaction History] from the left menu.
3. Find the **Subject** of the sent Reference Email in the **Description** column.
4. Look just above that entry for a record of each emailed doc or link.
5. Hover over the **Updated On** date to see the time it was sent.

Between them, the email record and the per-doc records show exactly what was sent, to which transaction, and when.

Reference List FAQ

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.

See Reference List FAQ

Reference List Troubleshooting

Running into a problem? Start here.

- A Reference Doc Won't Open or Download