Doc Comments

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Leave a note right on a doc and it travels with the document — your team sees it, the agent hears about it, and *Transaction History* keeps the record.

Introduction

Page three came back without an initial. You need the agent who uploaded it to hear that, to know which document you mean, and to still be able to find what you said when the corrected version turns up a week later.

A comment does all three. It attaches to the one document rather than to the transaction, so there's no describing which file you're talking about, and the agent who uploaded it gets an email carrying what you wrote. That's why offices lean on comments as their main channel to agents: it's the one message that arrives already pointed at the thing it's about.

The agent reads the correction with the document open in front of them, instead of matching a message to a file afterwards. Comments are working notes rather than permanent record, so you can edit or delete one whenever you like. What stays is the trail. *Transaction History* logs each comment, so a note you removed last month still shows up when someone reconstructs what happened on the file.

How It Works

A bubble beside every doc, a toggle for the whole list, and a few rules about who can write and who gets told.

The Bubble

Click the gray bubble to the right of a doc name to write a comment. Once it's saved, the bubble turns blue, and clicking it again opens the comment to read, edit, or delete.

Showing and Hiding Comments

The bubble in the doc list header toggles every comment in the list at once. Blue means all comments are showing; gray means they're hidden. It's a per-user setting, so hiding comments changes your view and nobody else's — which is why one person can insist there are no comments while a teammate is reading them.

Who Can Comment

Admins with **View All Transactions** for the location can comment on any doc they can see, and edit or delete comments. Agents can comment on docs they uploaded themselves, and only while those docs are still theirs to manage: once an admin has commented or marked the doc **Reviewed**, the agent's comment option goes away.

Who Can See a Comment

Comment visibility follows the doc's Permission Category. If a doc sits in an office-only category, agents can't open the doc, so they can't see its comments either — and they won't be emailed about them. Moving the doc to a category agents can reach fixes both at once.

When an Agent Gets an Email

When the company setting **Email agents when admin comments on documents** is on, an admin comment emails the agents on the transaction who can view that doc, plus whoever uploaded it. The email carries the comment text, the admin's name, the transaction name, and the doc name, with a link straight to it. Edit the comment later and a second email goes out with the update. The setting is company-wide: it's on for everyone or off for everyone.

What a Comment Doesn't Do

Comments aren't threaded. When an agent replies, the reply lands in the transaction's notes and email history rather than back on the doc, and there's no record of whether an agent read a comment or acted on it.

Add a Comment to a Doc

> Pin a note to one document so it travels with the doc and reaches the right person.

> **Who Can Do This**: Admins with **View All Transactions** on any doc they can see; agents on their own docs, until an admin comments or marks the doc reviewed.

To add a comment to a doc:

1. Open the transaction and find the doc in its doc list.
2. Click the gray bubble to the right of the doc's name.
3. Enter your comment.
4. Click [Save].

The bubble turns blue, so your team can see there's something to read. If agent notifications are on, the agent is emailed the comment.

Edit a Comment

> Change what a comment says without starting a new one.

> **Who Can Do This**: Admins with **View All Transactions**; agents on their own comments, until an admin comments or marks the doc reviewed.

To edit a comment:

1. Open the transaction and find the doc in its doc list.
2. Click the blue bubble to the right of the doc's name.
3. Change the text, then save.

The comment updates in place. If agent notifications are on, the agent gets a second email with the new wording.

Delete a Comment

> Take a comment off a doc once it's been dealt with.

> **Who Can Do This**: Admins with **View All Transactions**; agents on their own comments, until an admin comments or marks the doc reviewed.

To delete a comment:

1. Open the transaction and find the doc in its doc list.
2. Click the blue bubble to the right of the doc's name.
3. Click the X icon, then confirm [Delete].

The comment comes off the doc and the bubble turns gray again. The record of it stays in *Transaction History*.

Show or Hide All Comments

> Switch every comment in a doc list on or off at once.

> **Who Can Do This**: Anyone who can see the doc list. The setting is yours alone and doesn't change anyone else's view.

To show or hide all comments:

1. Open the transaction and go to its doc list.

2. Click the comment bubble in the list header. Hovering it tells you which way it will go — "Show all comments" or "Hide all comments".

A blue header bubble means comments are showing; gray means they're hidden. With comments hidden, you can still read one at a time by clicking a doc's own blue bubble.

Drag a Comment Into a Note or Email

> Copy a comment straight into a message instead of retyping it.

> **Who Can Do This**: Anyone who can see the comment and add a note to the transaction.

To drag a comment into a note or email:

1. Go to the transaction and click [Note / Email] just above the doc list.
2. Compose your message, or select a saved template.
3. Drag the comment into the **Message** field.
4. Review and revise the wording if you need to.
5. Click [Add Note].

The comment, who wrote it, and the date and time land in the message as normal text.

Decide Whether the Agent Gets Emailed

Offices split on this. Some want every admin comment in front of the agent that minute; others leave notes between staff all day and would rather none of it landed in an inbox. The switch, and what the message looks like when it goes out, sit with the notification itself.

An admin leaves a comment on a doc, and Pipeline emails it to the agent with a link straight to the document.

See Doc Comment Notifications

Doc Comments FAQ

A doc comment pins a note to one document, shows as a blue bubble, and emails the agent when an admin leaves it. Answers to the common questions about who can comment, who gets notified, and what happens when a comment is deleted.

See Doc Comments FAQ

Doc Comments Troubleshooting

Comment not working the way you expect? Start here.

- Why Can't I Add or See a Doc Comment?