Add a Shared Inbox to Your Staff Recipients

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The Staff list on a transaction's message area is built from your account's users, so an address that isn't a user can't appear there. Make the inbox a user and it can — and it takes one checkbox plus one permission.

Introduction

Your accounting inbox should be on every CDA. Your marketing address should be one click away when a listing goes live. Somebody types it in by hand each time, sometimes gets it wrong, and eventually asks whether it can just live in the Staff list with everyone else.

It can, once you understand what that list is. Staff recipients aren't a list of addresses. They're a list of*people on your account who can see this transaction*. That's why a bare email address has nowhere to go: the list is generated from users, and it's scoped by who has visibility where.

So the setup is to make the shared inbox a user. Give it a profile, tick the box that puts it in the Staff section, and grant it View All in the Locations whose transactions it belongs on. Three steps, none of them requiring master admin.

When to Use This

- Your accounting or bookkeeping inbox should be a checkbox on every transaction email, not a typed address.
- You want the marketing team copied on notes without remembering their address each time.
- A shared inbox needs to be included automatically on CDAs going out of one office.
- Someone is appearing in your Staff list who shouldn't be.
- You've tried to add an email address to Staff recipients and there's nowhere to put it.

1. Add the Inbox as a User

Create a profile the way you'd create one for a person, using the shared address as the login email — *Accounting*, *Marketing Team*, whatever your office calls it. The name you give it is the name that appears in the Staff list, so name it for how people will look for it.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

> Pipeline identifies users by login email, so one address can't be a user on two accounts. If the same bookkeeping inbox serves two Pipeline accounts, give the second one an alias of the same address — mail still lands in the same place.

2. Tick the Staff Recipients Box

On the new profile in Manage Users, check **Include this user in the staff recipients section of Notes**, then save. That's the switch that puts a user in the Staff list at all — and unchecking it is how you take somebody off it later, which is the answer to the other half of this question.

A user's profile holds who they are and where they work — their name, role, primary location, and license number.

See User Profile

3. Grant View All Where It Should Appear

The checkbox alone isn't enough, and this is the step people miss. The Staff list on a given transaction is drawn from master admins and from admins holding **View all transactions for this location** in *that transaction's* Location. No visibility, no listing.

So grant the inbox View All in each Location whose transactions it should appear on. It doesn't need master admin, and it doesn't need any other permission to do this job.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

> The Location scoping is useful rather than annoying. Give your Texas bookkeeper View All in the Texas Location only and they show as a Staff recipient on Texas transactions and nowhere else — the list stays short and correct in every office instead of listing everyone everywhere.

> View All means the inbox can open every transaction in those Locations, not only be emailed about them. That's the trade for the convenience. Give the profile a real password, keep it to the Locations that need it, and treat it as an account that can see your files — because it can.

4. Check It on a Transaction

Open a transaction in one of those Locations and start a note or an email. The inbox now appears in the Staff section as a checkbox alongside your admins — one click to include it, every time, no typing.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

> For an address that only ever needs one message — a title company on a single closing, an attorney on one file — don't build a profile for it. Type it into the external recipients field on that transaction and be done.