Hand Over a Transaction's Email History

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A licensing board, an E&O carrier, or a departing agent wants the correspondence on a deal. Here's each way to get it out, and which one fits what they asked for.

Introduction

Sooner or later somebody outside the office asks for a transaction's emails. There's no export button that does this, and going looking for one is where most of the time gets lost — so start from the other end. Every route already exists; you're choosing between them.

What you're choosing on is two things: which record they want, and what shape they want it in. Sent mail and received mail live in different places and come out as different files, and "email me a copy" and "produce it for the file" want different answers.

When to Use This

- A licensing department or E&O carrier has asked for the correspondence on a specific deal.
- An agent wants their own emails from a transaction and can't find an export.
- You need a paper or PDF copy of what was said on one file.
- You created a new offer from a listing and the original emails didn't come across.
- The transaction is closed and you need its record without pulling the whole account.

Why This Beats Waiting for an Export Button

Almost everyone starts by hunting for a download link on the emails themselves, and it isn't there — which reads like a gap until you see where the record actually lives. A transaction's correspondence isn't a separate feature with its own export; it's part of the transaction, so it comes out when the transaction comes out.

That's why the download and the backup both already contain it as a text file, ready to hand over. The record you're looking for has been packaged this whole time, just under the transaction's name rather than the email section's.

1. Work Out Which Record They're Asking For

Two different logs, two different files, and it's worth settling before you start pulling things.

What you sent — the notes and emails written from the transaction — is the log at the bottom of the transaction page, and it comes out of a download as a notes text file. **What came in** — mail forwarded or replied into the transaction — lives under *Received Emails*, and comes out as an email history file.

Most outside requests want both. Ask, if the request is vague; producing one and calling it complete is the failure mode here.

Every note you add and every email you send from a transaction lands in one running log at the bottom of the page.

See Notes & Sent Emails

2. Download the Transaction and Take the Text File Out

For one deal, this is the cleanest route. Download the transaction and the zip carries the documents plus the correspondence as text files — hand over the whole zip, or just the file they asked for.

It's also the answer when an agent asks for their own emails. There's no agent-facing export, so an admin does this once and sends them the file.

Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

See Individual Transaction Downloads

3. Pull It From a Monthly Backup Instead

If you already have the backups, the same files are in there and nothing new needs generating. This is the route when the request covers several transactions, or when the deal is old enough that you'd rather work from the archived copy.

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

> Producing records for a state audit rather than for one transaction? That's a bigger job with its own route, including ordering past backups you no longer hold.
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> An auditor named a period that reaches back years, and every transaction in it is already in your backups. This is how to get them out and into the auditor's hands.
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> See Produce Your Records for a State Audit

4. Print It When Paper Is What They Asked For

Some requests want something readable rather than a data file. Printing the transaction page from your browser puts the notes and sent emails at the end, and saving that as a PDF gives you one document to attach.

When you want only the correspondence and not the whole transaction, select just that section on the page and use your browser's print-selection option. For received mail, expand the messages you want on the *Received Emails* page and print from there.

Forward an email into a transaction and it stays there — the subject, the message, and a record of what came attached.

See Received Emails

5. Carry the History Onto a New Offer

One consequence catches people out: when a deal restarts and you create a new offer from the original, the emails don't come across. The documents and the structure do; the correspondence stays on the transaction it happened on.

Two ways to carry it. Resend the relevant emails to the new transaction's maildrop address, which files them properly as received mail. Or take the email history text file out of a download of the original and upload it to the new transaction as a document — less elegant, but it's one action and the whole record travels.

Restart a deal or manage multiple offers without starting over — New Offer gives you a clean, linked transaction.

See [New Offers]