Keep a Note or Email Off the Agent's View

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Some things said about a deal aren't for the agents on it. Pipeline already hides more than most people expect, and a checkbox covers the rest.

Introduction

A broker writes to a coordinator about an agent's paperwork. An admin flags a commission problem. Someone needs the other side's agent not to read what was just said. The worry is always the same: a transaction is a shared file, so does everything on it get shared?

No — and it's worth knowing the actual rule before you build a workaround around a problem you don't have. Agents on a transaction see the messages they sent themselves and nothing else. On top of that default, a private checkbox pulls a message back to you and the admins. Where those two don't reach, there are three more routes: send it in from outside, put it in a place agents can't look, or split the deal into two files.

When to Use This

- You need to say something to a coordinator or broker that the agent on the file shouldn't read.
- You represent both sides and neither agent should see the other side's correspondence.
- A note you meant to be confidential turned out to be visible to the agent.
- Commission or fee detail is on a dual-sided transaction and only staff should see the figures.
- A contact on the deal shouldn't be visible to the other side's agent.

Why This Beats Keeping It Out of Pipeline

The instinct is to take the sensitive conversation somewhere else — a side email, a text, a note in a spreadsheet. It solves the privacy problem by giving up the thing you came for. Six months later the deal is in question and the reasoning behind a decision is in somebody's personal inbox, which is exactly where a file's history is least useful and least defensible.

Everything below keeps the record on the transaction and controls who can read it, which is a different trade. The audit trail stays complete; the visibility narrows. That's worth a checkbox.

1. Start With What Agents Already Can't See

Agents don't see each other's messages. An agent on a transaction sees only what they themselves sent — not an admin's message, not another agent's, not the co-listing agent's on the same deal. That's deliberate, and it's the reason anything can be said on a transaction at all.

So for most of what people worry about, the answer is that it's already handled. Check the rule before you build around it.

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. Mark the Note or Email Private

When you want it narrower still — or when internal recipients are involved and you want the boundary explicit — tick **Make this note private** before you add or send. A private note comes back to you and the admins. A private email adds the internal recipients you put on it, and nobody else. Private entries are marked in the log, so anyone reading it later knows what they're looking at.

It's per message. There's no account setting that makes everything private by default, so it's a habit rather than a configuration.

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

> Private means private from **agents**. Every master admin, and every admin with View All in that location, sees all notes and emails on all transactions — including private ones. There's no way to keep a note from one admin and show it to another. If a conversation genuinely can't be seen by other admins, it doesn't belong on the transaction.

3. Or Send It In From Your Own Email Instead

There's a second route with a different shape, and offices that do this regularly tend to prefer it. Write the message in your own email program and send it *to* the transaction's maildrop address rather than out of Pipeline.

It files under *Received Emails*, and the visibility rule there works in your favour: an agent sees only the messages they themselves sent in. Anything an admin mails in stays with the admins. The record is on the transaction, the conversation happened in your inbox, and nothing had to be ticked.

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

See Received Emails

4. Put the Sensitive Detail Where Agents Don't Look

Some of what needs hiding isn't a message at all. Two places take it.

Admin Info is the field for figures and detail meant for staff. Commission fields on a dual-sided transaction can't be suppressed from one side, so when a number shouldn't be on the shared face of the file, that's where it goes.

A document in a staff-only permission categorytakes anything longer. File it as Private or Office Docs, add a doc comment for the conversation about it, and it stays with the people whose permissions reach that category.

Two things decide who can see a document: whether the person can get to the transaction it lives on, and which permission category the doc was filed under.

See [Document Access]

> Contacts are the one thing with no privacy option. Everyone on a transaction sees every contact on it, and there's no per-side setting. If a contact genuinely can't be seen by the other side, either leave them off the shared transaction or use the split below.

5. Split the Deal When One File Can't Hold Both Sides

When an in-house deal has both sides working it and the two shouldn't see each other's anything, stop making one transaction do a job it isn't shaped for. Running the listing side and the buying side as separate transactions is a normal, supported way to work, and plenty of offices do exactly that for this reason.

The other structural move is a location of its own — put a team in their own Location and grant View All there, and they see everything inside it and nothing outside. It's the right answer when a group needs to share fully with each other and not at all with the rest of the office.

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See Transaction Access