# Notes & Sent Emails

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

## Introduction

Six months after closing, somebody asks what went to title and when. If the answer lives in an inbox, it lives with whoever sent it, and finding it means asking them to go looking.

That question is what the log at the bottom of a transaction is for. Notes, sent mail, received mail, and scheduled messages collect there as they happen, in order, on the deal they belong to. What it isn't is a shared mailbox. Each message keeps the audience its sender gave it, so what you see in the log is your part of the conversation, and an agent's view of the same transaction is narrower than yours. That's deliberate, and it's the reason people are willing to say anything candid on a transaction at all.

Nobody has to remember, and nobody has to be asked. It travels, too: the correspondence comes along when a transaction is printed or downloaded, which is what makes it useful at audit time and not only in the moment. If an agent tells you they can't see a message you're looking right at, nothing is broken and nothing is misconfigured — the log is showing each of you a different slice of the same transaction on purpose.

## How It Works

The log collects everything said on a transaction and shows each person the part they're entitled to see.

### What Lands in the Log?

Notes added on the transaction, emails sent from it, mail received into it, and scheduled messages once they go out. Pipeline labels a sent message *email sent* and keeps the subject, the sender, the recipients, the full message, and a timestamp with it. The log only records messages that actually went out, so it doubles as your delivery check. On a brand-new transaction the section appears with the first note, email, or status change.

### Who Sees What?

Admins see everything on the transaction. Agents see the messages they sent themselves — not an admin's, not another agent's, not a co-listing agent's on the same deal. The sender always decides who can read it, and that's the reason anything candid can be said on a transaction at all. To let an agent read a message, add them as a recipient when you compose it; to keep one away from the agents on the file, mark it private, which holds it to you, any internal recipients on it, and admins.

### How Do I Get the Record Out?

It travels with the transaction. Download the transaction and the zip holds a *Notes* text document with the Notes & Sent Emails entries and an *Email_History* text document with the received mail, which is what makes the log useful at audit time and not only in the moment.

## Reply to a Message on a Transaction

> Reply from inside Pipeline and the reply is logged on the transaction — where the agent can read it.

> **Who Can Do This**: Anyone with access to the transaction.

To reply to a message on a transaction:

1. Open the transaction and scroll down to the *Notes & Sent Emails* section.
2. Click the [Reply icon] next to the email or comment you're replying to.
3. Write your message, and add any recipients or docs you need.
4. Click [Send Email].

Pipeline logs your reply with the rest of the transaction's messages, and the person you replied to can read it there. Reply from your own email program instead and the message goes to their inbox — but it won't appear on the transaction.

## Print a Transaction's Notes and Emails

> Take a paper or PDF copy of everything said on a transaction.

> **Who Can Do This**: Anyone with access to the transaction.

To print a transaction's notes and emails:

1. Open the transaction.
2. Use your browser's print command.
3. Print the page, or save it as a PDF.

The Notes & Sent Emails entries print at the end. To print received mail as well, click [Received Emails] from the left menu, expand the messages you want included, and print that page.

## Delete an Entry from Notes & Sent Emails

> Master admins can take a note or a sent email off the record when it was added in error.

> **Who Can Do This**: Master admins.

To delete an entry from Notes & Sent Emails:

1. Open the transaction and scroll down to the *Notes & Sent Emails* section.
2. Hover over the entry you want to remove.
3. Click the [X] that appears to the right of it.
4. Confirm the deletion.

The log is part of a transaction's audit trail, so deleting from it is limited to master admins on purpose. Not one? Your office admin's details are under *Admin & Support* on your Home page.

## Notes & Sent Emails FAQ

The log records what was sent, by whom, and when — and shows each person only their own share of it. Answers to the common questions about visibility, replies, delivery, and getting the record out. See Notes & Sent Emails FAQ.

## Notes & Sent Emails Troubleshooting

An agent saying they can't find a message? Start here.

- Why Can't an Agent See an Email on a Transaction?