Staff Recipients Section FAQ

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The Staff section is built from your users, and two settings decide who's on it. Answers to the common questions about missing names, taking yourself off the list, Location scoping, and why one checkbox reaches one mailbox.

How do I get somebody to show up in the Staff list when I email from a transaction?

Two things, and they're both checkboxes. Tick **Include this user in the staff recipients section of Notes** on their profile, and make sure their role lets them view all transactions in that transaction's Location. Miss either one and they aren't listed.

I added a new master admin and their name isn't in the list. What's wrong?

Nothing. A master admin's profile settings can only be changed by that master admin. They sign in, go to *My Info*, and check **Include me in the staff recipients section of Notes** under **Your Email Settings**. Opening their profile from Manage Users won't offer you that box.

Can one checkbox reach my whole closing team?

No. Each name in the list is one user profile, and it sends to the one address on it. The way offices handle a team is a forwarding rule in that mailbox, so the message Pipeline sends to the profile fans out to everyone who needs it.

Does everyone on the Staff list get every email automatically?

No. Being listed makes someone an option, not a subscriber. They're included when the sender checks their name on that message, and not otherwise.

Could one of our agents end up in the Staff list and see every transaction?

No. Appearing there takes permission to view all transactions, which agents don't have. The include box on its own does nothing without that permission, so an agent stays out of the Staff section whatever their profile says.

How do I take my own name off the list?

Uncheck the box on your own profile. Go to *My Info*, find **Your Email Settings**, uncheck **Include me in the staff recipients section of Notes**, and save. Your name comes off the Staff section from then on.

The list shows my staff's personal addresses and I'd rather it showed our business one.

The Staff section shows each person's name and the email address they sign in with. To list a business address instead, add a profile that signs in under that address and include it in Staff recipients, then uncheck the people whose own addresses you don't want on the list.

Why does someone appear on transactions in one office but not another?

The list is scoped by Location. A person shows in the Staff section on transactions in the Locations where they can view all transactions, and nowhere else. Grant that permission in another Location and they appear there too.

Where do the agents on a transaction come from, if not this setting?

They're listed on their own, under Agent Recipients. An in-house agent assigned to a transaction is offered as a recipient on that transaction automatically. The Staff section is for admins and staff, and it's the only half of the list a setting controls.

Learn More

Check a name instead of typing an address. The Staff section of a transaction's message area lists the people in your office you can send to, and two settings decide who's on it.

See Staff Recipients Section