Staff Recipients Section

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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.

Introduction

You send the same few people the same kind of message all week, and you type one of their addresses every time. Then somebody joins the back office and doesn't turn up in the list at all.

That list is the Staff section, and it's built out of your account's users rather than out of addresses. Two things put a person on it: a box on their profile saying to include them, and permission to view all transactions in the Location the deal belongs to. Both have to be true, which is what keeps the list short and right in each office instead of showing everyone everywhere.

So a name that isn't there is nearly always one of those two, and both are a checkbox. Once somebody is on the list they're on it for every transaction they can see, and nothing reaches them until a sender checks their name.

How It Works

The section is drawn from your users, gated by what each of them can see, and it sends only when a sender checks a name.

Who Appears in the Staff Section

Two things have to be true at once. The person's profile has **Include this user in the staff recipients section of Notes** checked, and their role lets them view all transactions in that transaction's Location — master admins, or admins holding that permission there. Agents are handled separately: an in-house agent assigned to the transaction is listed under Agent Recipients on their own deals, with nothing to switch on.

Whose Profile the Switch Sits On

The person's own, which means it can be set from either side. An admin who can reach the*Manage Users* page opens the profile and ticks the box. Anyone can do it for themselves from *My Info*, under **Your Email Settings**. A master admin's profile settings are the exception: only that master admin can change them, so a new master admin adds themselves.

A Name on the List Is One Mailbox

The section shows each person's name and their login email address, and checking it sends to that address. A profile named for a team still reaches the one mailbox behind it, so an office that wants a whole closing team on one checkbox puts a forwarding rule in that mailbox and lets it fan out from there. Being listed doesn't send anyone anything on its own; the message goes out when the sender checks the name.

Add Yourself to the Staff Section

Put your own name in the Staff list so anyone sending from a transaction can reach you with one click.

Who Can Do This: Anyone with a Pipeline login — it's a personal setting, and each person sets their own.

To add yourself to the Staff section:

1. Click the [Gear] in the upper-right corner, then [My Info].
2. Under **Your Email Settings**, check **Include me in the staff recipients section of Notes**.
3. Click [Save Settings].

Your name appears in the Staff section on transactions in the Locations where you can view all transactions. Uncheck the same box to come back off the list.

Add or Remove Someone Else

Put a colleague in the Staff list, or take them out of it, from their user profile.

Who Can Do This: Admins who can reach the Manage Users page. A master admin's own profile settings can only be changed by that master admin.

To add or remove someone else:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users] and open the person's profile.
3. Check **Include this user in the staff recipients section of Notes** to list them, or uncheck it to take them off.
4. Confirm they can view all transactions in each Location whose deals they should appear on, then save.

They show as a checkbox in the Staff section on transactions in those Locations, and nowhere else.

Give Your Bookkeeping or Marketing Inbox a Permanent Checkbox

An address that belongs to a desk rather than a person can be on this list too, and the setup is the same two settings pointed at a profile you create for it.

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.

See [Add a Shared Inbox to Your Staff Recipients]

Set Where Somebody Can See Transactions

The include box is half of it. The other half is a Location-by-Location permission, and it's the one that decides which offices a person turns up in.

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

See [User Permissions]

Staff Recipients Section FAQ

Answers to the common questions about missing names, taking yourself off the list, Location scoping, and why one checkbox reaches one mailbox.

See [Staff Recipients Section FAQ].