Transaction Notes FAQ

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A note records something on a transaction and stays with the deal as part of its permanent record. Answers to the common questions about editing, deleting, formatting, notifications, and who can see what.

Can I edit a note after it's been added?

No — notes can't be edited once they're added. A note is part of the transaction's record and may already have gone out to someone, so it stays exactly as written. To correct or update one, add a follow-up note that references the original — something like "Re: [original subject]" with your update above the original text — so the change is documented rather than hidden.

Can a note be deleted if it was added by mistake?

Only a master admin can delete a note. Notes are part of the transaction's audit trail, so removing one is deliberately limited — and worth doing only when something was added in genuine error. If you're not a master admin, ask your office admin to take care of it; you'll find their contact details under Admin & Support on your Home page.

How do I add myself to the Staff Recipients list on notes and emails?

Turn it on in your own settings — no one can add you. Go to [Gear] → [My Info], and under Your Email Settings, check "Include me in the staff recipients section of Notes," then save. Every admin has to do this for themselves; to take someone off the list, an admin can uncheck the matching setting on that person's profile in Manage Users.

Can I @mention or tag someone in a note to notify them?

No — there's no @mention in notes, but an email does the same job. A note by itself doesn't notify anyone. Add the person as a recipient and send it as an email from the transaction instead — it reaches them and still gets logged on the transaction right alongside your notes, so you don't lose the record.

Can I format the text in a note?

Yes — use the formatting options at the top of the message window. You can add headings, bold, italics, links, bulleted and numbered lists, a horizontal line, and emoji, and markdown shortcuts work too. Underline isn't one of the available options.

Can I see full timestamps without hovering over each note?

Yes — switch on Show timestamps. In the Notes & Sent Emails section, open the settings menu (⁝) and choose "Show timestamps." Pipeline remembers your preference and keeps timestamps visible across all your transactions.

Can I comment on a document without sending an email notification?

Yes — turn the notification off in your Email Settings. Doc comments email agents by default. Go to [Gear] → [Admin / Settings] → Email Settings, uncheck the option that emails agents when an admin comments on a document, and save. The comment still appears on the doc for anyone who opens it — it just doesn't send.

Is there a character limit for a note?

Yes — 15,000 characters. Paste in more than that and you'll get an error rather than a saved note. Split the content across a couple of notes, or — if what you're pasting is really a document — save it as a PDF and upload it to the transaction instead, where it's easier to find later.

Learn More

Leave a note on a transaction to document a detail or keep the team on the same page.

See Transaction Notes

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.