Get Your Email Correspondence Into the Transaction File

Last Modified on 11/10/2026 12:27 pm EST

Half the story of a deal is in your inbox and none of it is on the file. Forward it to the transaction's own address and the whole conversation lands where the rest of the record already lives.

Introduction

Documents are the easy part — they were always going to end up in Pipeline. The correspondence is what gets left behind: the lender's confirmation, the inspection back-and-forth, the message where the seller agreed to the repair credit. Six months later that's the part someone asks for.

Every transaction has its own email address, and Pipeline keeps everything you send to it: the subject, the message body, and the attachments. So the work isn't really about Pipeline. It's about getting mail out of an inbox and into that address without doing it fifty times by hand, and knowing which formats survive the trip.

When to Use This

- Your compliance file has to hold every email about a deal, not just the signed paperwork.
- There are forty-odd emails sitting in one Outlook folder and you have no intention of forwarding them one at a time.
- You forwarded emails in and only the attachments showed up — the messages themselves vanished.
- You forwarded emails as attachments and Pipeline showed a file it couldn't open.
- An agent is leaving and their correspondence has to come off their laptop and onto the transactions.

Why This Keeps the Message and Not Just the Attachment

Most people already email documents in, so the instinct is to use the same address for correspondence. That address is usually the working docs one — and working docs is built to do exactly one thing: pull the attachment off an email and hand it to you. The email that carried it doesn't survive. Send your correspondence there and you'll get the PDF you didn't need and lose the message you did.

A transaction's own maildrop address behaves differently. It keeps the whole message whether anything was attached or not, and files it on that transaction under *Received Emails*. That is the difference between archiving documents and archiving a conversation, and it comes down to which address you type.

1. Send It to the Transaction's Own Address

Open the deal in Pipeline and take the maildrop address from the top of the transaction. Forward to it, or add it as a recipient while you're writing — either way the message arrives whole and files itself on that transaction.

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

See Received Emails

Use the **transaction's** address, not your working docs address. Working docs exists to collect attachments — anything sent there has its message body dropped, and no amount of resending will bring it back.

2. Put the Address Where Your Email Program Can Find It

Maildrop addresses aren't memorable, and that's the friction that stops people doing this consistently. Fix it once per deal: save the transaction's address as a contact in your own email program and name the contact after the property. From then on you start typing the address and your inbox offers the right transaction.

It's the same trick that makes the address usable at a scanner or on a phone — the address lives in the address book, not in your head.

Send or forward a message to the transaction it belongs to. Pipeline keeps the message on the file and sends its docs to Unassigned, already pointed at that transaction.

See Your Transaction Maildrop Address

3. Move a Backlog Without Forwarding Fifty Times

There's no bulk-forward button, so the answer depends on which email program you're in. Both routes end the same way: one thing arrives instead of fifty.

In Outlook, select the emails you want and print them to a single PDF, then send that PDF to the transaction's address. Outlook can also save a block of selected emails as one text file — you upload that one rather than emailing it in, since a text file won't come through the maildrop.

In Gmail, a browser extension does it. Support points people at CloudHQ's multi-email forwarder, which combines a selection into one forward. It isn't ours, so treat it as a recommendation rather than a supported feature.

Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

See Uploading Docs

Sending emails in one at a time is still perfectly valid, and it's the only route that keeps each message readable as its own entry. Batching into a PDF trades that for speed — it arrives as a document, not as correspondence. For a live deal, forward as you go; for a backlog, batch it.

4. Send a PDF When the Format Fights You

Emails forwarded as file attachments — the `.eml` and `.msg` files your program creates when you drag a message somewhere — don't render in Pipeline. They upload and then sit there unreadable, which is worse than not having them. If your account only accepts PDFs, they're refused outright.

The fix is the same everywhere: forward the actual email rather than attaching it, or print it to PDF and send the PDF. Save-as-PDF is the one format that behaves the same on every device and in every account.

Restrict uploads to PDFs and you can preview, rotate, merge, and break apart everything that lands in your

account without leaving Pipeline.

See PDF-Only Restriction

> Getting a rejection notice while your documents clearly arrived? A small logo image in an email signature can be refused on its own while the message and its PDF attachments come through fine. Shrink the signature image or drop the signature when you're emailing into Pipeline.

5. Automate the Forward When It's Every Email

If a transaction generates constant mail, set your email program to forward to the maildrop automatically and stop thinking about it.

Gmail has one catch worth knowing before you start. It confirms a new forwarding address by emailing a verification code to it — and that code lands in the maildrop, where you can't read it. Send the verification request, then contact us with the maildrop address and roughly when you sent it, and our Tech Team pulls the code out and hands it to you. It's a two-minute detour, not a dead end.

> Other platforms verify differently — some send a clickable link rather than a code, and those need a different approach. Tell us which platform you're forwarding from and we'll work out the route with you.