Know When Someone Replies to a Transaction Email

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Pipeline doesn't tell you a reply came back. One saved search does — and it takes about a minute to set up.

Introduction

You email the lender from a transaction, and then you wait. There's no alert when they answer, no read receipt, no badge that changes colour. For a lot of admins that turns into opening transactions to check, which is the slow version of the thing you're about to build.

Two moves cover it. Get replies to actually reach you, which comes down to one instruction you give your recipients. Then stop relying on that instruction by building a single search that shows every transaction that received mail today, saved to your Home page where you'll see it.

When to Use This

- You sent something from a transaction and have no idea whether anyone replied.
- An agent swears they replied and it never reached your inbox.
- You're opening transactions one at a time just to check for new mail.
- A client says they never received your email and you have no copy to re-send.
- You want a once-a-day sweep of everything that came back, not an alert per message.

Why This Beats Changing the Reply-To

The natural request is to make replies come to you instead of to the transaction. It isn't a setting, and the reason is the thing you'd lose by getting it. The transaction's maildrop is the Reply-To on purpose: it's what makes a reply file itself onto the deal instead of dying in one person's inbox. Redirect it and the transaction stops collecting the conversation — you'd have solved your notification problem by breaking the record.

So the answer isn't to redirect replies, it's to send them both ways and to watch centrally. Reply All puts the message on the transaction *and* in your inbox. The saved search catches everything Reply All missed. Between them you get the alert you wanted and keep the file intact.

1. Ask for Reply All, and Know Why It Matters

Whether a plain Reply reaches you depends on who you sent to, which is why this behaves inconsistently until you know the rule.

Internal recipients — people on your Pipeline account — reply to the transaction's maildrop. A plain Reply from them goes to the transaction and nowhere else, so it lands on the file and never reaches your inbox. They have to use Reply All. Pipeline puts a reminder at the top of those emails for exactly this reason.

External recipients — a client, a lender, the other side's agent — reply to your own login address, so a plain Reply does reach you. Reply All is still worth asking for, since it's what also puts their answer on the transaction.

Emails you send out of Pipeline arrive from help@paperlesspipeline.com with your name on them, and replies come back to you.

See Send-From Identity

2. Build the Search That Finds Every Reply

Instructions get forgotten, so don't depend on them. Go to the Transactions page, open More Search Options, and filter by the date a transaction received email — today, or the last week if you'd rather sweep less often. The result is every deal that got mail in that window, in one list.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

3. Save It to Your Home Page

A search you'll run every morning shouldn't be rebuilt every morning. Save it — call it something like "Email Received Today" — and it sits in your left menu as one click.

That's the whole monitoring system: one link, checked when you sit down, showing you exactly the deals that need reading.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

4. Read the Replies on the Transaction

Open a transaction from the list and the replies are under *Received Emails*, with the message and anything that came attached.

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

See Received Emails

> The number beside *Received Emails* is a running count of what the transaction has received — not a badge for unread mail. It doesn't reset when you read them, so treat it as "has this deal had mail" rather than "is there something new."

5. BCC Yourself So You Can Prove It and Re-send It

There are no read receipts, and there's no way to forward a sent message back out of Pipeline. Both gaps close the same way: BCC yourself when you send. You get a copy in your own inbox, so when someone says it never arrived you can forward the original in seconds rather than retyping it.

When receipt genuinely matters, ask for it in the message — a line asking them to reply and confirm — and put a follow-up task on the checklist so the ask doesn't evaporate. It's a person-shaped confirmation rather than a technical one, and for most offices it's the one that holds up.

> If a recipient insists nothing arrived, it's almost always their side — a spam folder or a rule on their mail server. Ask them to search for mail from help@paperlesspipeline.com before anyone assumes it wasn't sent.