Composing an Email FAQ

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A transaction's message area sends notes, emails, docs, and task lists to whoever needs them. Answers to the common questions about recipients, attachments, privacy, and what happens after you hit send.

Who can send an email from a transaction?

Anyone with access to the transaction. There's no separate messaging permission — if you can open the deal, you can write a note or send an email from it.

Can I attach a file from my computer?

No. A message can only carry docs that are already in Pipeline — on the transaction, or on your company's Reference page. Upload the file to the transaction first, then attach it, or send it from your own email program.

Do I have to pick a recipient?

Only if you're sending an email. A note needs no recipient at all — leave everyone unselected, write it, and click [Add Note].

How do I keep the transaction name out of the subject line?

Start your subject with a pipe character. Type `|` (Shift and the `\` key) as the first character and Pipeline leaves the transaction name off the subject. It's also the fix when a transaction name contains an emoji that a recipient's mail server rejects.

Who can see a private note or email?

You, admins, and any internal recipients on the message. A private note added by an admin is visible only to admins. A private email is visible to admins and to the internal recipients you sent it to — an agent who wasn't a recipient won't see it on the transaction.

Can I recall an email after I send it?

No. Send a short follow-up asking the recipient to disregard it. You can also delete the message from the transaction's *Notes & Sent Emails* section using the X to its right, though that only removes the Pipeline record — it doesn't pull the email back.

What happens when someone replies?

It depends on whether they're in your account. Replies from internal recipients route back onto the transaction, because Pipeline includes their maildrop address on the message. Replies from outside recipients go to the sender's own inbox.

Can I attach every doc at once?

Yes. Select the checkbox at the top of the documents list to take everything. To grab one document category, hold [Shift] and click any doc inside it, then deselect anything that shouldn't go.

If I send a zip file link and then delete a doc, can the recipient still get it?

No. Pipeline builds the zip at the moment the recipient clicks the link, from the docs on the transaction right then. Delete a doc before they click and it isn't in the package. If they already downloaded it, deleting afterward doesn't affect the copy they have.

Can I send a list of tasks with my message?

Yes — append them below the message box. Choose incomplete, completed, or overdue and Pipeline adds the matching tasks to the bottom of the message. An option you don't see means there are no tasks of that type to append. Appended tasks follow task visibility, so recipients see only what they'd see in Pipeline.

Learn More

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See [Composing an Email]

Still Have Questions?

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