Composing an Email

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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.

Introduction

The conversation on a deal tends to scatter. Some of it sits in your sent folder, some in a coordinator's, and none of it is where the next person thinks to look.

Every transaction has a message area of its own, just above the documents. Write a note there and it stays inside Pipeline as a record. Write an email and it goes out to whoever you pick, inside your account or outside it. The two share one composer because they're the same act from the transaction's point of view: something was said about this deal, and the deal keeps it. What you attach comes from inside Pipeline rather than off your computer, which is what keeps the message and the file it carried on one record.

Six months on, the note explaining why a deadline moved sits on the transaction next to the docs that moved with it, not in somebody's archive. It also means whoever covers for you has what they need without asking, which is the part most offices notice first.

How It Works

The message area sits on the transaction itself, just above the documents, and one composer handles both notes and email.

Who Can I Send To?

People in your Pipeline account get a checkbox next to their name; outside recipients go in the **Send To An External Email Address** field, and BCC blind-copies an address. If a contact or an outside agent is already on the transaction, drag their email address down from the areas above instead of typing it. Leave every recipient unselected and what you write is a note: kept on the transaction, sent to nobody. Either way it's saved to *Notes & Sent Emails*.

What Can I Put In It?

Anything already in Pipeline — docs on the transaction, blank forms from your company's Reference page, the transaction's coversheet with its contacts if you want them, and a list of incomplete, completed, or overdue tasks. Appended tasks respect task visibility, so recipients see only the tasks they'd see inside Pipeline. A file sitting on your computer goes onto the transaction first. Below the message box you can also make the note or email private, BCC yourself, and save what you've written as a reusable message template.

What Goes Out, and Where Do Replies Land?

Leave the subject blank and Pipeline uses the transaction name; type your own and Pipeline adds the transaction name to the end of it; start the subject with a pipe character (`|`) — Shift and the `\` key — to leave the transaction name out entirely. Messages to internal recipients carry their maildrop address, so their replies route back onto the transaction. Outside recipients don't have maildrop addresses, so their replies go straight to the sender's own inbox.

Send an Email From a Transaction

Write to your team, your client, or anyone outside the account, and send transaction docs along with it.

Who Can Do This: Anyone with access to the transaction.

To send an email from a transaction:

1. Go to a transaction.
2. Scroll down and click [Note / Email] just above the Documents area.
3. Select the checkbox next to each internal recipient, or enter an outside address in**Send To An External Email Address**.
4. Enter a **Subject** and your message.
5. Select any of the options below the message box.
6. Click [Send Email].

Your email goes out and a copy is saved to the transaction's *Notes & Sent Emails* section.

Add a Note to a Transaction

Leave a record on the transaction without sending anything to anyone.

Who Can Do This: Anyone with access to the transaction.

To add a note to a transaction:

1. Go to a transaction.
2. Scroll down and click [Note / Email] just above the Documents area.
3. Leave every recipient unselected.

4. Enter a subject and your note.

5. Click [Add Note].

Your note is saved to *Notes & Sent Emails*. Nothing is emailed.

Attach Docs to an Email

> Send docs that are already on the transaction, or blank forms from your Reference page.

> **Who Can Do This**: Anyone with access to the transaction.

To attach docs to an email:

1. In the composer, select the checkbox next to each doc you want from the transaction's docs list or from Reference Docs.

2. To attach everything on the transaction, select the checkbox at the top of the documents list.

3. To attach a whole document category, hold [Shift] and click any doc in that category, then deselect anything that shouldn't go.

4. Finish your message and click [Send Email].

Docs go out as individual attachments. When their combined size runs over 5 MB, Pipeline sends them as links instead.

Send Docs as a Zip File Link

> Bundle every attached doc into one downloadable package — a tidy way to send a closing package.

> **Who Can Do This**: Anyone with access to the transaction.

To send attached docs as a zip file link:

1. Attach your docs to the email.

2. Select [Send Docs as Zip File Link].

3. Finish your message and click [Send Email].

The recipient gets one link. Pipeline builds the zip when they click it, using the docs on the transaction at that moment, so a doc deleted before they click won't be in it.

Make a Note or Email Private

> Keep a message out of an agent's view of the transaction.

> **Who Can Do This**: Anyone with access to the transaction.

To make a note or email private:

1. Compose your note or email.

2. Select [Make this note private (in Notes & Sent Emails below)].

3. Click [Add Note] or [Send Email].

A private message is visible to you, to admins, and to any internal recipients on it. An agent who wasn't an internal recipient won't see it.

Reply to a Message on a Transaction

> Answer a sent email, a received email, or a doc comment without leaving the transaction.

> **Who Can Do This**: Anyone with access to the transaction.

To reply to a message on a transaction:

1. Go to the transaction and scroll to the *Notes & Sent Emails* section.

2. Click the [Reply] icon next to the message or doc comment you're answering.

3. Write your reply and choose your recipients.

4. Click [Send Email].

Your reply goes out and is saved to the transaction alongside the rest of the thread.

What Your Recipient Sees in the From Line

The thing people notice about their first Pipeline email is that it didn't come from their own address. It's the question support hears most often about messaging, and the answer is about deliverability rather than a setting you missed.

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

Composing an Email FAQ

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.

See Composing an Email FAQ