

Documents For Header

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Attach docs to a message and Pipeline adds a *Documents for* line at the top, so recipients see at a glance what arrived and which transaction it belongs to.

Introduction

You write a careful note to a client, attach the disclosure, and send. What arrives at the top of their message is a line you didn't write, naming the deal. It's automatic, and it catches people out the first time they see one of their own emails from the outside.

The line is there for the person on the other end. Escrow officers, lenders, and title companies read dozens of these a day and skim every one, so a message that says up front what's attached and which file it belongs to gets filed against the right deal. That's the trade: a line of Pipeline's wording above your own, in exchange for your documents not landing on somebody else's transaction.

How It Works

One line, added by Pipeline, on outgoing messages with documents attached.

When It Appears

Only when documents are included. A note or an email with nothing attached doesn't get one.

What It Says

Documents for, followed by the transaction name.

Why It's There

It's deliberate. Recipients skim, and escrow officers, lenders, and title companies are reading dozens of these a day. The line makes it obvious at a glance that documents are attached and which file they belong to, which is what keeps them from being filed against the wrong deal.

What You Can Change

The transaction name. Start your subject line with a pipe character (|) and Pipeline leaves the transaction name out of the subject and out of this header line.

What You Can't Change

The header itself. There's no setting to remove it and no way to resize it, and it isn't on the roadmap. It renders small on the original message; a forwarded copy can show it larger, depending on the recipient's email program.

Sending something where the header would be a distraction? Send it in two parts — the message text on its own, with nothing attached and so no header, then the docs in a second message.

Documents For Header FAQ

The *Documents for* line appears on any message that carries docs, and it isn't configurable. Answers to the common questions about removing it, resizing it, and keeping the transaction name out of it.

See [Documents For Header FAQ](#)
