# Share a Transaction With Someone Who Isn't a Pipeline User

Last Modified on 09/04/2026 11:16 am EDT

Escrow needs the closing package, your client wants a copy of everything, the lender wants three disclosures. None of them needs a login — and here's how to get them what they're asking for anyway.

## Introduction

Pipeline has no external role. There's no guest seat, no read-only client portal, no shareable view link. Every user you add belongs to a Location, and that's where this goes wrong: an outside company added as a user can see far more than the one deal you meant to share. Offices discover it after the fact, which is exactly the wrong time.

The good news is that you almost never need to add anyone. Every document on a transaction can be emailed out of it, the whole file can be downloaded and trimmed, and the outside party's details can live on the transaction as a Contact without any account at all.

## When to Use This

- Escrow or the title company is asking for the closing package.
- Your client wants a copy of everything after close of escrow.
- You added an outside company as a user and found they can see every transaction in that location.
- A lender needs a few specific disclosures and you don't want to hand out an account for it.
- Someone outside your brokerage wants to send documents*in*, and you're about to give them a maildrop address.

## Why This Beats Adding Them as a User

The instinct is reasonable: they need to see the file, users see files, so make them a user. What that actually does is put a company you don't control inside a Location, where Pipeline's permission model — built for agents, admins, and brokers in one brokerage — gives them a great deal more than the transaction you had in mind. Support discourages it for that reason, and the offices that have done it are the ones who found out.

Sending is the safer shape and usually the faster one. You pick exactly what leaves, it's logged on the transaction, and there's no access to take back when the deal is done.

## 1. Record Them on the Transaction as a Contact

Before anything goes out, put the escrow officer, the lender, or the attorney on the transaction as a Contact. It costs nothing, it means their email is right there the next time someone needs it, and it keeps you from hunting through your inbox for the address.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See [Adding a Contact]()

## 2. Email the Documents From the Transaction

The message area at the bottom of every transaction is the tool for this. Attach the documents you want to send, write the note, and it goes out with a record kept on the transaction — which is worth as much as the send itself when someone asks later what you gave them.

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]()

> Size decides the shape of what lands. Under 5MB total, the documents arrive as attachments. Over 5MB, Pipeline sends a secure link to the files instead, hosted on its own servers, so a fifty-page closing package doesn't bounce off the recipient's mail server. You can also choose **Send Docs as Zip File Link** deliberately when you want everything in a single download rather than a pile of attachments.

## 3. Hand Over a Trimmed Copy of the Whole File

When they want the entire transaction rather than a few documents, download it and send the download. The one thing to do before you pass it on: open the ZIP and take out the Financial folder, which holds the commission paperwork nobody outside the brokerage should be reading.

Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

See [Individual Transaction Downloads]()

> An audit is its own version of this job, with its own rules about what leaves and what stays. See [Give an Auditor What They Need, Not Your Whole Account]().

## 4. Never Give Out a Maildrop Address

This one is worth being blunt about. It is technically possible to give an outside party your maildrop address, or to BCC it on a message to them, and their attachments will land on the transaction. Don't. Pipeline identifies the sender by the maildrop address the email came to, so every document they send arrives credited to *you* — in the transaction history, in the download, in the record an auditor reads.

The workflow that keeps the trail honest is one step longer and worth it: they email the document to your agent or admin, who forwards it to their own maildrop address.

Email your documents to a maildrop address and Pipeline pulls the attachments in — no logging in, no uploading.

See [Maildrop]()

## 5. If They Truly Need a Login, Scope It Hard

Some outside people really are working the file — an outside transaction coordinator, most often. That's the one case where an account makes sense, and it only works if the account is small: agent-level, no admin permissions, and added to each transaction they're supposed to touch. Without admin permissions they see nothing but the transactions they're on.

A TC touches every file in your office but shouldn't own any of them. Three setups, and the one you pick decides what they see.

See Set Up a Transaction Coordinator With the Right Access

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions