Send and Track Email Without Leaving the Transaction

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Every message about a deal can start, go out, come back, and be found again on the transaction itself. Templates do the writing, drag-and-drop does the attaching, and one saved search tells you which files got mail.

Introduction

The email about a deal has a way of leaving the deal. It gets written in someone's mail program, the reply lands in one inbox, and six months later nobody can say what went to title or when.

The transaction has its own message area, and once you work from it the record keeps itself. A template with autofill tags writes the routine messages for you. The checklist, the contacts, and the doc comments already on the file drag straight into the body. A whole category of documents attaches in one click, and a single page can go out on its own. Replies come back to the transaction, and a saved search shows you every file that received mail today.

What you end up with is the correspondence in one place, readable by the people who should read it, and a lot less typing on the way there.

When to Use This

- You send the same welcome, reminder, or clear-to-close message on every deal and retype it each time.
- One admin writes the good templates and everyone else has a different version.
- You copy a contact's details or a checklist into an email by hand.
- A recipient needs one page of a packet, not all thirty.
- Clients say your emails look like they came from a system, not from you.
- A lender replied and you found out days later, on the wrong transaction.

1. Send a Routine Message in Four Clicks

A message template is a message you wrote once. Pick it from the saved message template list when you compose on a transaction, and the subject and body fill in. Autofill tags inside it pull the seller's first name, the listing date, or the close date from the transaction you are on, so nothing is typed.

Save a message you send often, then reuse it in a couple of clicks the next time a transaction needs it.

See My Templates

The easiest way to build one is on the way out, by saving a message you were about to send, as Build the Message Templates Your Office Sends Every Week shows.

Autofill Tags let Pipeline do the typing. Drop a tag into a message template and the transaction's own details fill themselves in every time you send.

See Autofill Tags

If you would rather not start from a blank page, the Template Library holds ready-made messages for every stage

of a deal.

The Message Template Library is a shelf of ready-made messages for every stage of a deal. Browse it, copy what fits, and make it your own.

See Template Library

2. Hand Your Best Templates to the Office

Templates are private until you share them. Share Message Templates and Keep Them When Someone Leaves shows how to share one with the whole office or with other admins only.

One admin can write a message once and hand it to the whole office. That's what sharing a message template does.

See Shared Templates

3. Drag the Transaction Into the Message

Anything already on the transaction can be dragged into the message you are writing, formatted, with no retyping.

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

Open [Note / Email] and drag from the sections above it:

- **A whole checklist**, by its name, into the message body. Every task comes across with whether it is done, its due date if it is not, and who checked it and when if it is.
- **One task**, by its name, when the whole list is too much.
- **A contact**, into the Send To An External Email Address field to address the email to them, or into the body to share their details with someone else.
- **A doc comment**, into the body. The doc name, the comment, who wrote it, and when all come with it.

The full set of drag-and-drop moves is in Work Pipeline Like a Power User.

4. Attach a Whole Category in One Click

Every doc on the transaction has a checkbox to the left of it in the composer, and the checkbox at the top of the list attaches everything. Between those two, hold [Shift] and click any doc in a permission category to attach every doc in that category. Shift-click a doc in a second category and that one comes along too. Shift-click again to clear a category. Two clicks attach all the sale docs and all the buyer docs for the buyer.

Docs go out as individual attachments until they pass 5 MB together, and then Pipeline sends links instead. For a closing package, check [Send Docs as Zip File Link] and the recipient gets one link.

When the document needs signing rather than reading, send it from the transaction as a Pipeline eSign request instead, and the signed copy comes back to the file on its own.

Send a document out for signature without leaving Pipeline — start from a transaction, from your Reference Library, or from a file on your computer.

See Sending eSign Requests

5. Send One Page, Not the Packet

When someone needs page 11 of the listing agreement and nothing else, break that page out as its own document first.

One scanned stack, many documents. Break a doc apart to split it into separate docs, pull out the pages you need, and name each one as you go.

See Doc Break Apart

To send a single page from a longer doc:

1. On the transaction, click the doc's [Gear], then [Break Apart].
2. Click the scissors on either side of the page you want, or click [Manual Mode] and set that page as both the first and last page of a new doc.
3. Name the new doc, for example Listing Agreement p11, and click [X] beside any page range you do not want to keep.
4. Click [Save].
5. Open [Note / Email] and attach the new one-page doc.

The page goes out on its own. The original stays on the transaction unless you checked [Delete original doc]. Agents can do this on docs they uploaded that an admin has not yet reviewed. Admins can do it on any doc.

6. Make Your Emails Look Like Email

By default a message sent from a transaction arrives in a gray box with the Pipeline logo at the bottom. Minimal formatting takes both off, so what a client or a vendor sees reads like an ordinary email from a person. It is one company-wide switch, set by a master admin.

Minimal formatting takes the gray box and the Pipeline logo off messages sent from transactions, so what lands in a recipient's inbox reads like a plain, ordinary email.

See Minimal Formatting

To turn it on, click the [Gear] in the upper-right corner, then [Admin / Settings], check Use Minimal Formatting for Emails Sent from Transactions, and save. A small footer stays, internal recipients still see the header naming the sender and the transaction, and headings in your templates arrive as bold text.

7. Know Which Files Got Mail

Pipeline does not notify you when a transaction receives an email. A saved search does the job. On the Transactions page, open More Search Options, set the date type to Email Received, choose Today or This Week, and search. Every transaction that received mail in that window is on the list. Click [Add Shortcut], name it Emails This Week, and it sits in your left menu from then on.

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 reason a reply lands on the transaction at all, and why you should ask outside recipients to Reply All, is in Know When Someone Replies to a Transaction Email.

8. Find the Message and Answer It

When you remember the message but not the deal, Power Search finds it from any page. Click into the box in the upper-left corner, choose the note field, and type a word from the subject or the body. Every transaction holding a note or email with that text comes back.

On a busy transaction the log at the bottom runs long. In the upper-right corner of the Notes & Sent Emails section, click [Search Notes], type a word from the message, and Pipeline highlights the entries that contain it.

When you find the email you were looking for, click the [Reply] icon to its right. Your answer goes out with the thread below it and is logged on the transaction, where the agent can read it. Reply from your own mail program instead and the message reaches the inbox but never the file.

Every note you add and every email you send from a transaction lands in one running log at the bottom of the page.

See Notes & Sent Emails