What's New (October 8, 2017)

Format notes and send structured emails from transactions: Format transaction notes and messages with bolded text, italics, bulleted lists, etc. Pipeline now supports the popular and easy-to-learn Markdown formatting method to give you better control over the appearance of your transaction notes.

Private Notes! Keep transaction notes visible only to sender and recipients. When adding a transaction note, you can now mark it as private with a single click. A private note is only shown to its author (i.e. sender) and recipients in the Notes & Sent Emails section of the transaction. Previously, all notes were shown to all users who had access to the transaction.

Copy and paste multiple tasks in one shot when setting up checklist templates: Paste in a list of tasks with one click to save time and minimize errors when setting up checklist templates.

Hide checklist completion percentages from agents to simplify agents' view of transactions: Uncheck the company-wide setting "Show checklist completion percentages to agents" to prevent your agents from seeing checklist completion percentages across their transactions. This can eliminate agents' confusion if the percentages reflect tasks that agents are not able to view.

Plus scores of small improvements.

Read the blog post for more info →

COMMISSION MODULE

Drill down Commission Summary data: Click figures on the Commission Summary report to see the Pending or Closed Transactions that were used to calculate those figures.

And scores of small improvements.

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