

## What's New (August 29, 2021)

**Fresh, new look:** Pipeline has gotten a facelift! You'll still see all the features you know and love in their same places, but with updated styling, coloring and other modern enhancements. Take a look around to check out all the new feels.

**Bump "Calendar Day" due date calculations to the next business day:** In addition to automatically calculating task due dates based on calendar days or business days, you can now calculate due dates by calendar days, but bump the due date to the next business day if it falls on a weekend. Select "Calendar Days (due business day)" for any tasks that need that calculation.

☒ Automatically apply this checklist to transactions

Based on Status: Listed  Based on Label: Residential

Based on Side: Listing

☐ Automatically apply to transactions in all locations

Document Names or Tasks to Track

- Listing Agreement
- Seller's Property Disclosure
- Agency Disclosure
- Lead-based Paint Disclosure (if applicable)
- Mold Disclosure

Due: 4 after Calendar Days (due business day) ☒

Visible to anyone

Due 20 business days after Acceptance Date

Visible to anyone

[Learn more about Due Date Calculations here →](#)

**Send closing package docs or other transaction docs as a single zip file:** When sending docs from a transaction, you can now send them as a link to a single zip file. When drafting your message, add yourself or others as a recipient, select the docs you'd like to send, then check "Send docs as a zip file link" before sending. The email will contain a link to the resulting zip file which can be forwarded to share or clicked to download and store.

Options

- ☐ Make this note private (in Notes & Sent Emails below)
- ☐ Send me a BCC (blind copy) of the message
- ☐ Save this message as a reusable template
- ☐ Append **incomplete** tasks to message
- ☐ Append **completed** tasks to message
- ☐ Append **overdue** tasks to message

Cancel Preview Message Add Note

Attached Docs

- ☒ Send docs as zip file link
- ☐ Attach this transaction's coversheet

Listing Agreement 0.1 MB  
Addendum 0.2 MB  
Seller's Disclosure 0.4 MB

Label	Document Name	Added On	Reviewed	Entered
Listing Docs - visible to listing agents on this transaction and office staff				
For Bt	Listing Agreement	22 hrs ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Addendum	22 hrs ago	<input type="checkbox"/>	<input type="checkbox"/>
	Seller's Disclosure	22 hrs ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Learn more about Sending Docs as a Zip File here →](#)

**Save up to 8 Transaction List shortcuts:** The limit on how many time-saving Transaction List shortcuts you can save has been increased from 5 to 8. Use these shortcuts to store any search or sort you run regularly, then run the search with just a click later. After running a transaction search/sort in Pipeline, click "Shortcut" to save it to your "My Shortcuts" menu.

This screenshot shows the top section of a transaction management interface. At the top, there is a search bar with the placeholder text 'Search address, mls, agent...'. To the right of the search bar are buttons for 'Options', 'Sort', 'Columns', 'Download', and 'Add Shortcut'. The 'Add Shortcut' button is highlighted with a red box and a red arrow pointing to it. Below the search bar, there are several filter sections: 'Status' with a dropdown menu set to 'Any Status', 'Searching by Updated On' with a dropdown set to 'This Week', 'Side' with a dropdown set to 'Any Side', and 'Location' with a dropdown set to 'Any Location'. There are also 'Label' and 'Commissions' dropdowns, and a 'Checklist Status' dropdown. A green 'Search Transactions' button is located to the right of these filters. Below the filters is a table with columns: Transaction, Status, Complete, Agents, Location, and Close Date. The first row of the table shows a transaction with ID '427', status 'April Release', location 'L-8 Residential', and a close date of 'May 31, 2020'.

[Learn more about Saving Custom Searches & Sorts here →](#)

**Automatically reference the More Info field in messages:** The More Info field is now an auto-fill tag available to be inserted into [reusable message templates](#). Adding this or other fields to message templates automatically inserts transaction-specific information from the field into the message whenever the template is used to send a message from a transaction. This allows you to effortlessly create very personal and custom messages with a single click. Most customers build (and share!) libraries of wonderfully elaborate messages using both [standard](#) and [advanced auto-fill tags](#).

[Learn more about Autofill Tags here →](#)

[Learn more about Message Templates here →](#)

[Learn more about Sharing Message Templates here →](#)

**Optional date fields included in transaction downloads:** If you've enabled any of the [optional transaction date fields / trigger dates](#) from the [Company Settings](#) page, those fields will now be included in transaction downloads.

This screenshot shows the main interface of the transaction management system. On the left side, there is a sidebar with sections: 'Add Transaction', 'Import Transactions', 'My Shortcuts', and 'Downloads'. The 'My Shortcuts' section lists several shortcuts with icons: 'Active Commercial', 'Closed with CDA', 'Duplexes', 'Expiring Today', 'My Transactions (sorted)', and 'Judy's Tasks'. The 'Downloads' section lists several download options: '2021 Spreadsheet', '2020 Spreadsheet', 'Full Spreadsheet', 'All Contacts', and 'Monthly Backup'. A red arrow points to the '2021 Spreadsheet' option. On the right side, there is a 'Transactions' section with a search bar and a list of transactions. The first transaction in the list is '5234 11th Place Austin TX 35234'. The second transaction is '63628 Branch Crossing, Austin'. The third transaction is '7628 Pinecrest Road, Austin TX'. The fourth transaction is '1234 Oyster Lane, Austin, TX 123'. The fifth transaction is '63728 Blooming Lane, Sicily TX'. The sixth transaction is '1234 Nukuhiva Dr.'. The seventh transaction is '6483 Juniper Road, Paris, TX 76'. The eighth transaction is '99999 SW 15th St, Topeka, KS 61'. The ninth transaction is '5405 Branch Crossing Austin T.'. The tenth transaction is '8604 Tyler Grove Austin TX 738'. The eleventh transaction is '100 Oakley Ave, Topeka, KS 666'.

[Learn more about Optional Transaction Date Fields / Trigger Dates here →](#)

**"Fax/Other" field label renamed:** Heads up that the "Fax / Other" field label you used to see in the License/Fax/Other section of Manage User profiles has been changed to "Other (Fax #, Team name, etc.)". Only the label has changed, so you can continue to store fax number or any other info in that field, as desired.

**– License # and Other Info**

License #

B658481

Other (Fax #, Team name, etc.)

415-555-4565


More Info


[Learn more about Editing User Profiles here →](#)


**Admins without Delete permissions can no longer delete docs while merging:** Heads up that we've fixed an obscure bug where admins with the "View All Transactions" permission, but without "Delete docs" permissions could elect to "Delete docs after merge" when completing the merge docs process. Without the "Delete docs" permission, they will no longer be able to do so.

## COMMISSION MODULE

**Easy access to Total Commission and Lead Source:** When managing commissions, you'll now see the Total Commission and Lead Source fields displayed on the left of the page.





 Transactions Tasks Unassigned

Update Commissions

← Go back to 90100 Oakley Ave., Topeka, KS ...

**Total Commission**

\$3,000.00

**Lead Source**

Buyer: Newspaper Ad  
Seller: Trulia

**Admin Info**

Referred by Jack Tinker

## Update Commissions

Escrow / Title

Escrow / Title Role

Company / Address

Escrow

Escrow 123

## Sale Info

Buyer's Name

John Fleming

Sale Price

\$125,000.00

Lead Source 

Buyer: Newspaper Ad  
Seller: Trulia

### Admin Info

Referred by Jack Tinker

## Update Commissions

Escrow / Title

Escrow / Title Role

Escrow

Company / Add

Escrow 123

### Sale Info

Buyer's Name

John Fleming

Sale Price

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[Learn more about Managing Commissions here →](#)