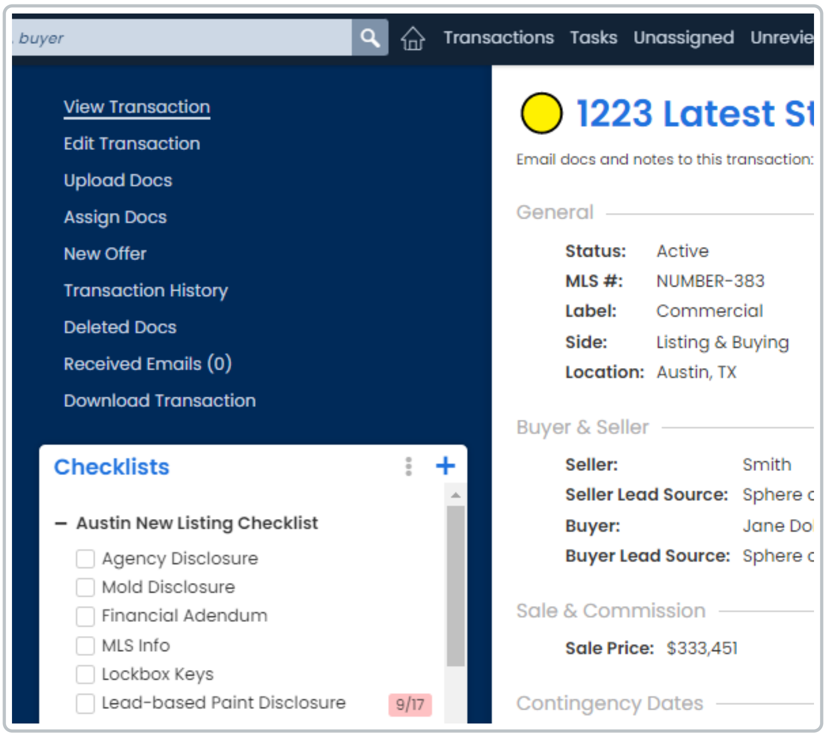
What's New (December 5, 2021)

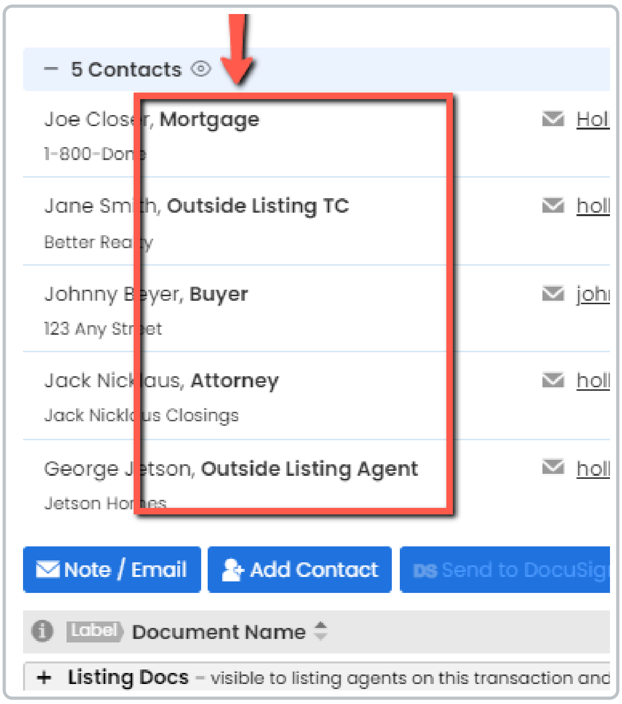
LOOK & FEEL

Style refresh is now even fresher: We've heard your feedback, both good and bad, and have made a few tweaks we're confident you'll be thrilled with! Pipeline has still retained the clean look and feel of the previous refresh, but we've refined it to enhance distinction and focus where warranted. This new version should be even more clear, clean, and easy on your eyes than before.

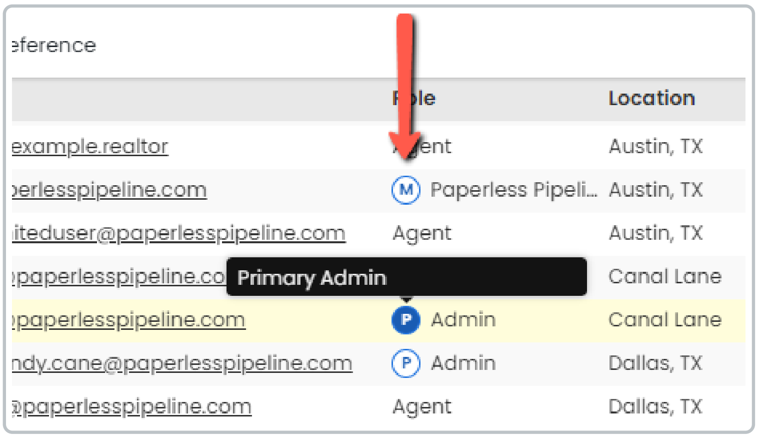
Also, if your account is utilizing the "Light" theme and the distinction between elements within a page is not significant enough for you, **be sure to try out the dark theme** to see if it's more to your liking.



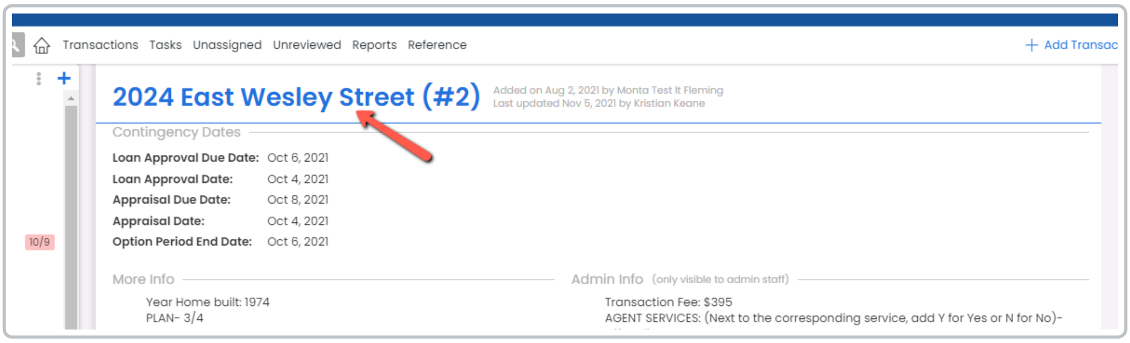
Contact roles bolded for quick identification: Contact roles are bolded allowing you to quickly locate contacts of a certain type.



Identify master and primary location admins at-a-glance: Identify Master Admins and Primary Location Admins more easily on the Manage Users list by viewing their new M and P icons.

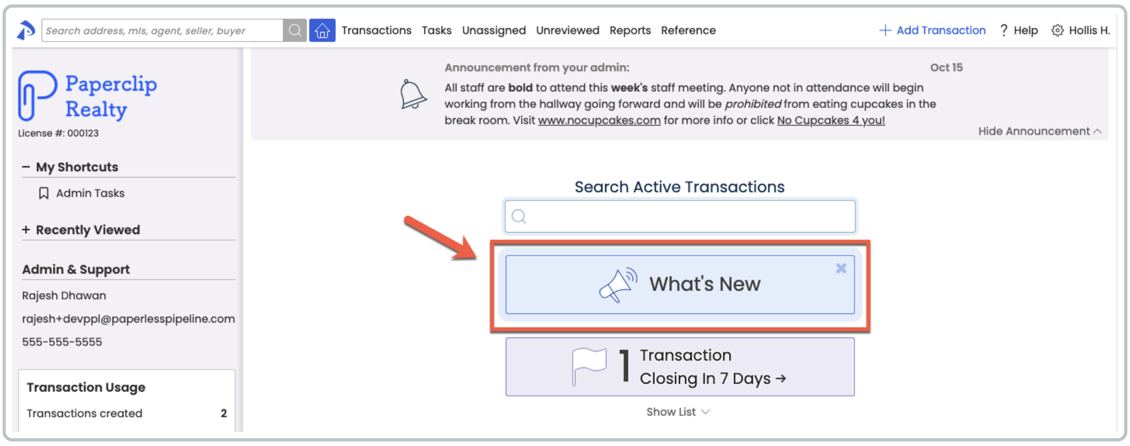


Identify the transaction you're on, no matter where you scroll: The transaction name at the top of transactions now remains frozen there, so you'll know which transaction you're on, no matter how far down the page you scroll.



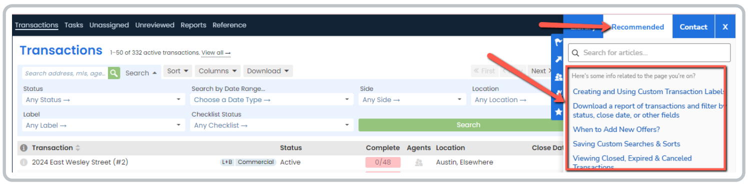
MORE HELP

Take advantage of new features the moment they're released: You won't be able to miss the new "What's New" button displayed whenever we launch a new release! Click it to view a list of recently released features, and it'll go away once you do. You can also still access "What's New" any time from the Help Menu.

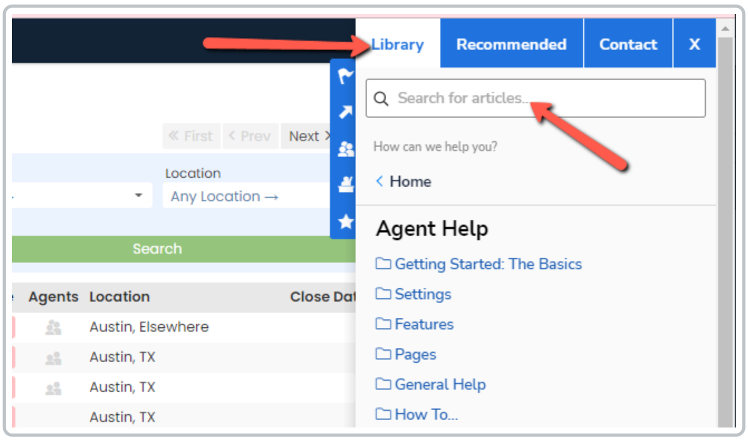


Help is closer and better than ever: Our new help widget is designed to get you the exact information you need easier and faster! Click Get Help (from the Help Menu) to get:

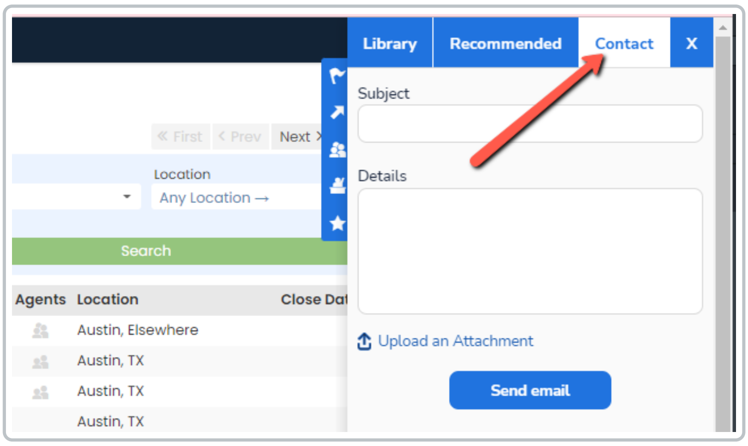
- Immediately shown links to articles related to the page you're on



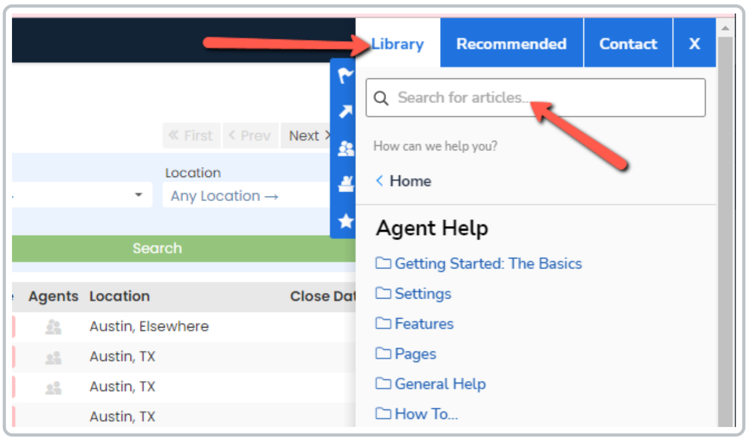
- Easy access to search the full help site



- As always, a simple way to contact us so we can help you along;



- All of the above happening within a new streamlined, in-page widget that allows you to stay within Pipeline while browsing and viewing articles.

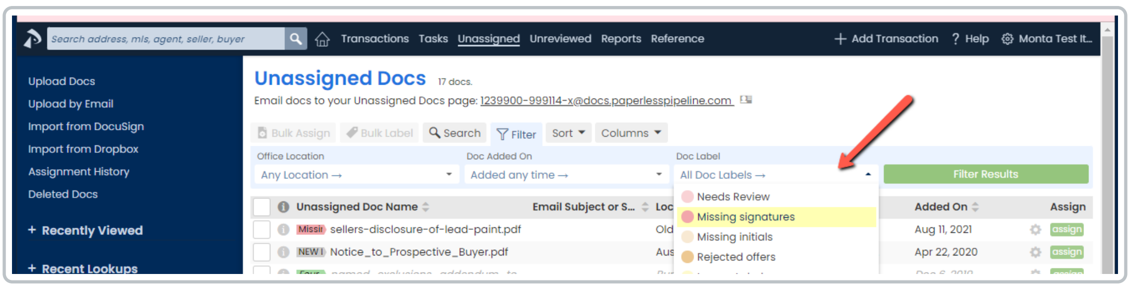


And as an added bonus, all links to articles you see throughout Pipeline will automatically launch the widget, so you'll see the exact information you need instantly AND within Pipeline! Woohoo!!!

Learn more about How to Get Help here →

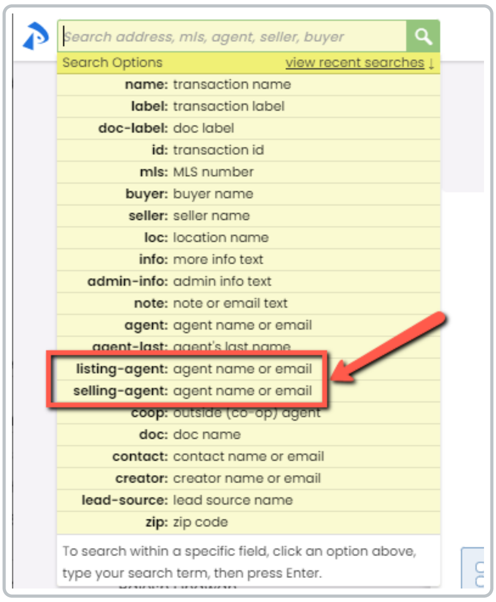
SEARCHING & FILTERING

View docs flagged for your attention: You can now filter Unassigned Docs by custom doc labels to quickly view the docs you need to see most. Doc labels are used to categorize docs based on priority, type, or other any classification, so you can now view only the docs that match the classification you need to see.



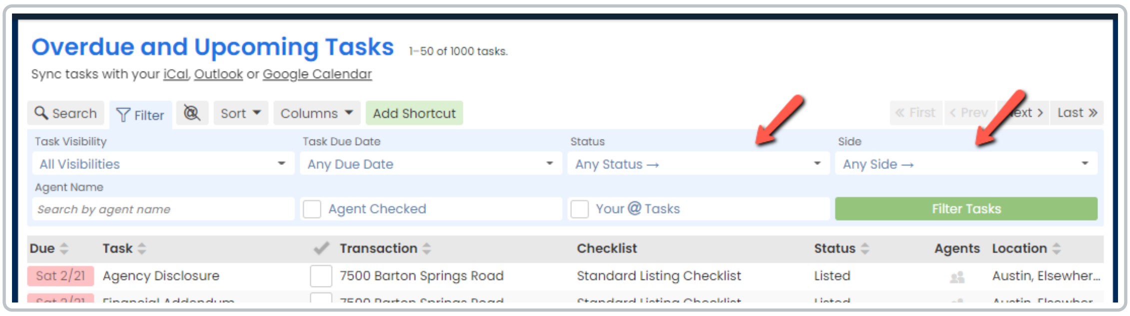
Learn more about Custom Color Coded Document Labels here →

Find agents' transactions based on their side: New "listing agent" and "selling agent" search options have been added to the global search bar allowing you to find transactions for an agents, only when they are on a certain side of the transaction. To run the search, select "listing agent" or "selling agent", type the agent's name or email address, then hit [Enter] on your keyboard.



Learn more about Searching & Filtering Transactions here →

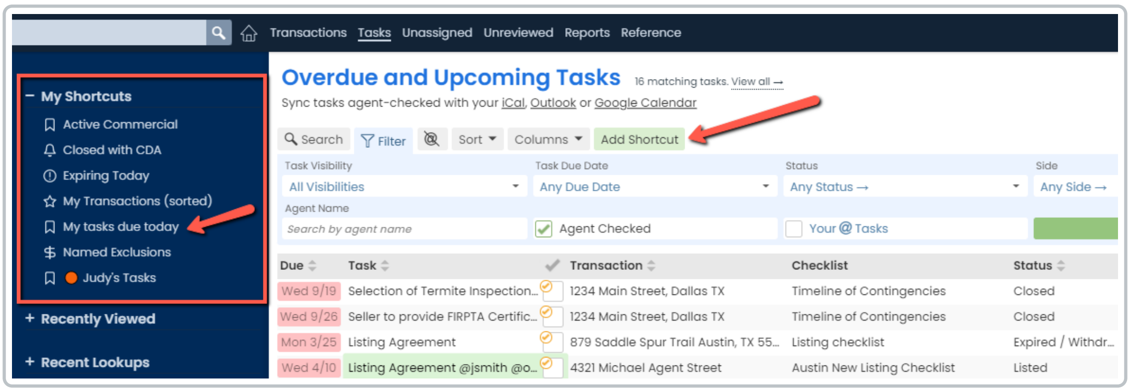
View tasks based on their status or side: New "Status" and "Side" filter options allow you to find tasks based on the side of the transaction represented and/or the status of the transaction.



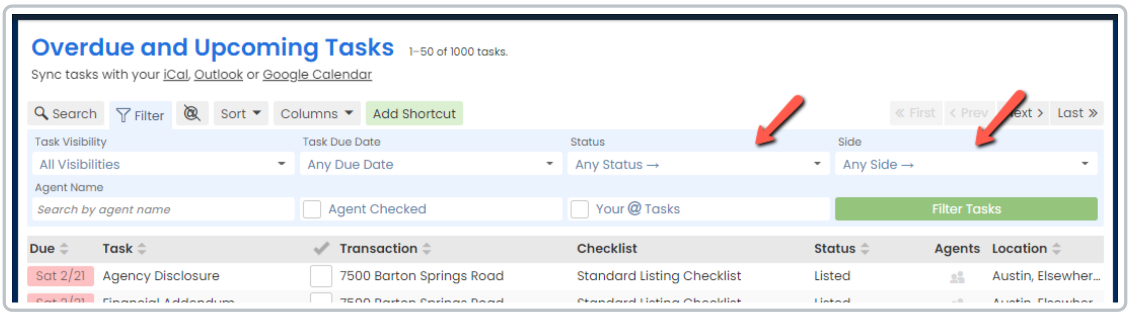
Learn more about searching and filtering tasks here →

Store your custom Task & Unreviewed searches for instant access later: You've told us how much you love saving your frequently-run *transaction* searches. Now you can create shortcuts for Task & Unreviewed searches, filters, and sorts, too! After running a Task or Unreviewed search or sort in Pipeline, click "Add Shortcut" to save your custom search to be run instantly from your Shortcuts menu on the Home, Tasks, and Unreviewed pages.

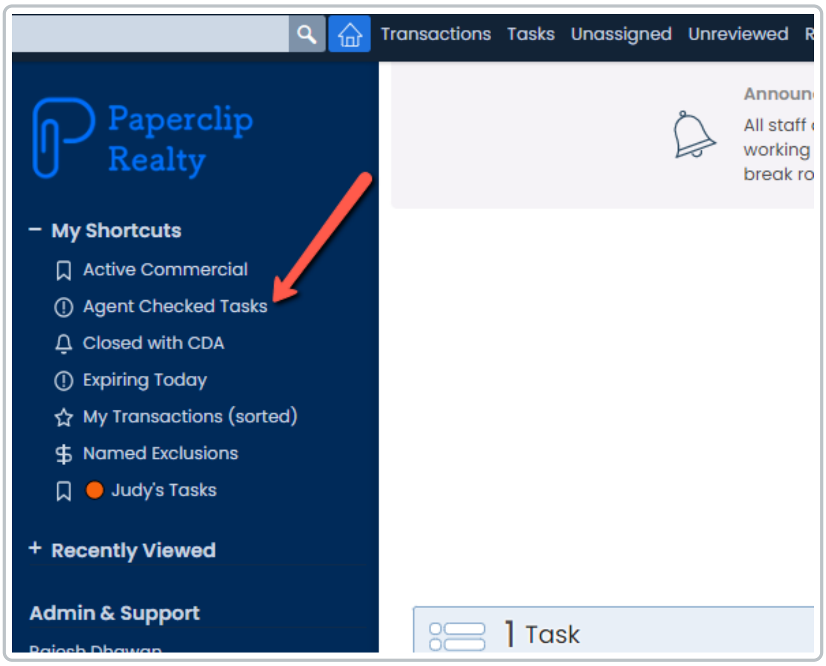
Learn more about Saving Custom Searches & Sorts here →



"Agent-checked" & "Your @ Tasks" are now combinable with other filters: You can now quickly access tasks agents have indicated they've completed and tasks where you've been @mentioned from the Filter dropdown menu on the Tasks page. That means you can combine those filters with all other task filters to help you hone in on the tasks you want to see.



And as an added bonus, as mentioned, you can now save task filters as custom shortcuts. That means you can have instant access to your agent-checked and @mentioned tasks from your home page!

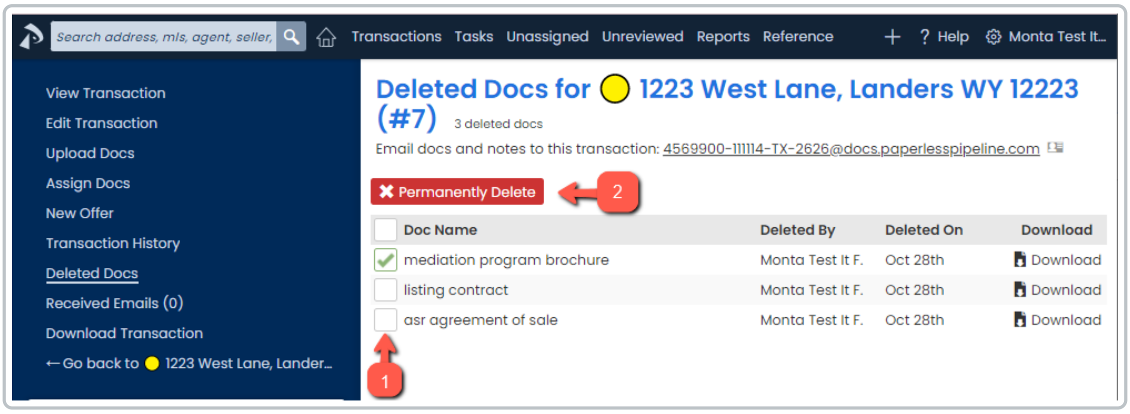


ADMIN CONTROLS

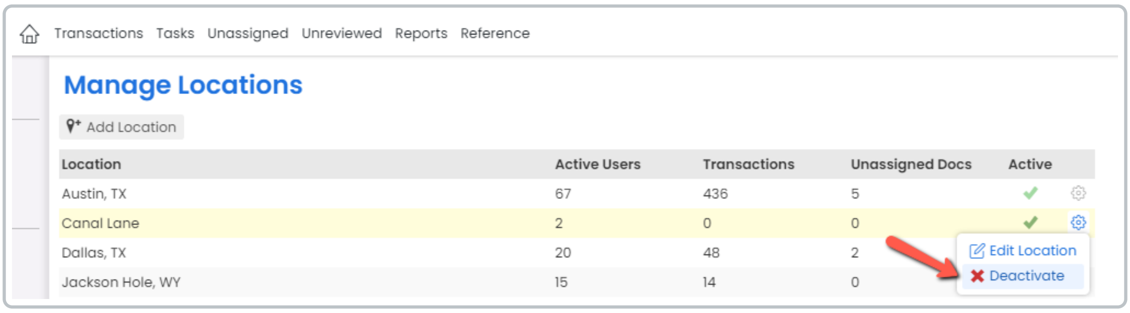
Start managing commissions whenever you're ready: You now have 100% control over Paperless Pipeline's Commission Module on your account. This means you can activate the Commission Module without having to contact Support or fill out additional forms. Check it out from the left menu of Admin/Settings under the Add-ons section.

Learn more about the Commissions & Reporting Module here →

Fully delete docs that need to be inaccessible: Deleted docs that need to be fully removed from the system because they contain sensitive information or otherwise need to be inaccessible can now be removed. Master admins can click "Deleted Docs" from the left menu of Transactions and Unassigned Docs, then either bulk or individually permanently delete the docs from there.



Move inactive locations out of your team's way: Deactivate locations no longer in use so you and your team can focus on the data that matters. Transactions and users can not be added to deactivated locations, and any transactions that may exist in deactivated locations will be grayed out to indicate their inactive state. Visit Admin | Manage Locations and click the gear icon to deactivate a location.



Learn more about Managing Locations here →

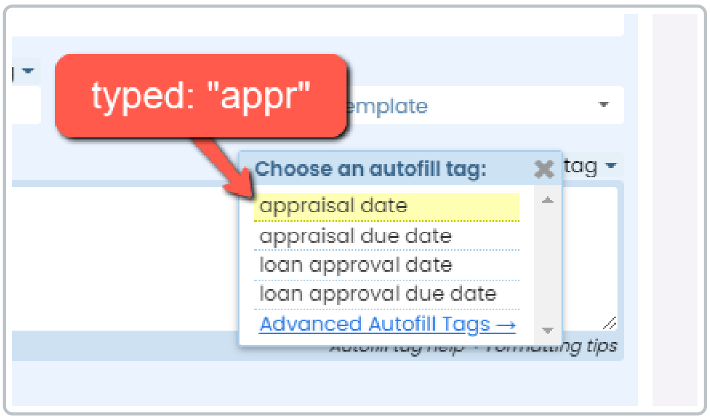
PRO TIPS & SHORTCUTS

Take a shortcut to editing transactions

The new [ctrl + shift + E] shortcut allows you to quickly access the edit page of a transaction. While viewing a transaction's main page, hold down the [ctrl] and [shift] keys on your keyboard, then tap the [E] key.

Learn about more keyboard shortcuts here →

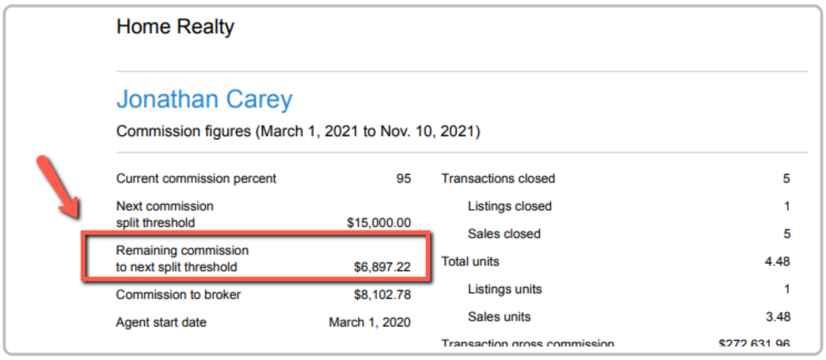
Build personalized message templates faster: Type-ahead has been added to the list of auto-fill tags on messages to allow you to find the tag you need faster. Engage the auto-fill tag list then start typing a tag name to see matching tags. If you're not using auto-fill tags in your message templates, you're missing out on seriously personalized automation! If you're not using message templates...I have no words.

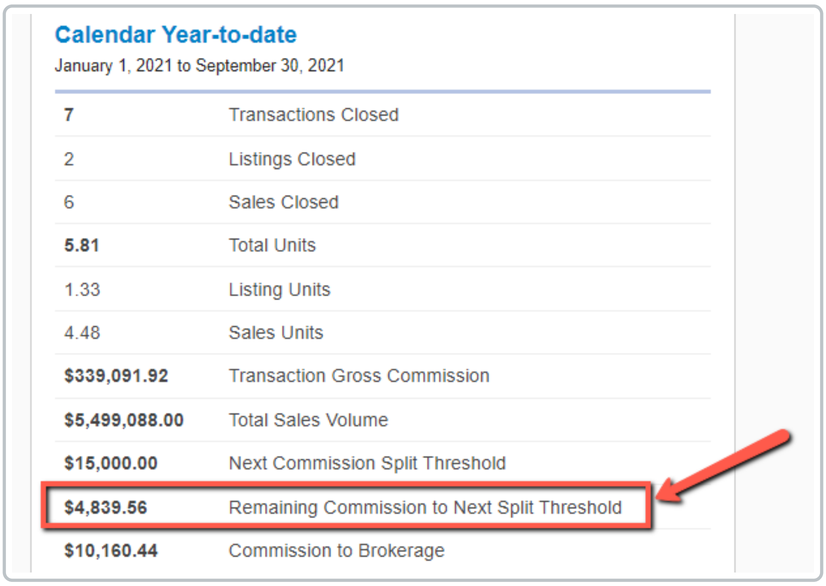


Learn more about Autofill Tags in Emails here →
Learn more about Reusable Message Templates here →

COMMISSION MODULE

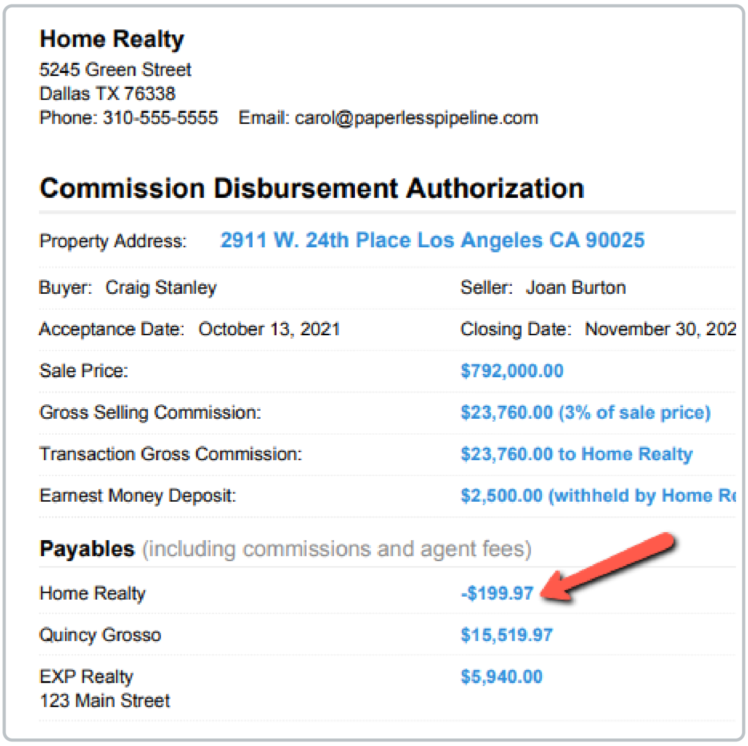
Know exactly how much remains before an agent meets their commission split threshold: No need to calculate how much is remaining before an agent's next commission split. The system now displays "Remaining Commission to Next Split Threshold" on the Agent Commission report and YTD Production email.





Learn more about Commission Split Thresholds here →

See true value of broker payable when it's negative: When the Earnest Money Held is greater than the broker net payable, CDAs will now reflect the appropriate negative amount.



Home Realty
5245 Green Street
Dallas TX 76338
Phone: 310-555-5555 Email: carol@paperlesspipeline.com

Commission Disbursement Authorization

Property Address:	2911 W. 24th Place Los Angeles CA 90025
Buyer: Craig Stanley	Seller: Joan Burton
Acceptance Date: October 13, 2021	Closing Date: November 30, 202
Sale Price:	$792,000.00
Gross Selling Commission:	$23,760.00 (3% of sale price)
Transaction Gross Commission:	$23,760.00 to Home Realty
Earnest Money Deposit:	$2,500.00 (withheld by Home Re

Payables (including commissions and agent fees)

Home Realty	-$199.97
Quincy Grosso	$15,519.97
EXP Realty 123 Main Street	$5,940.00

Learn more about Managing Commissions here →