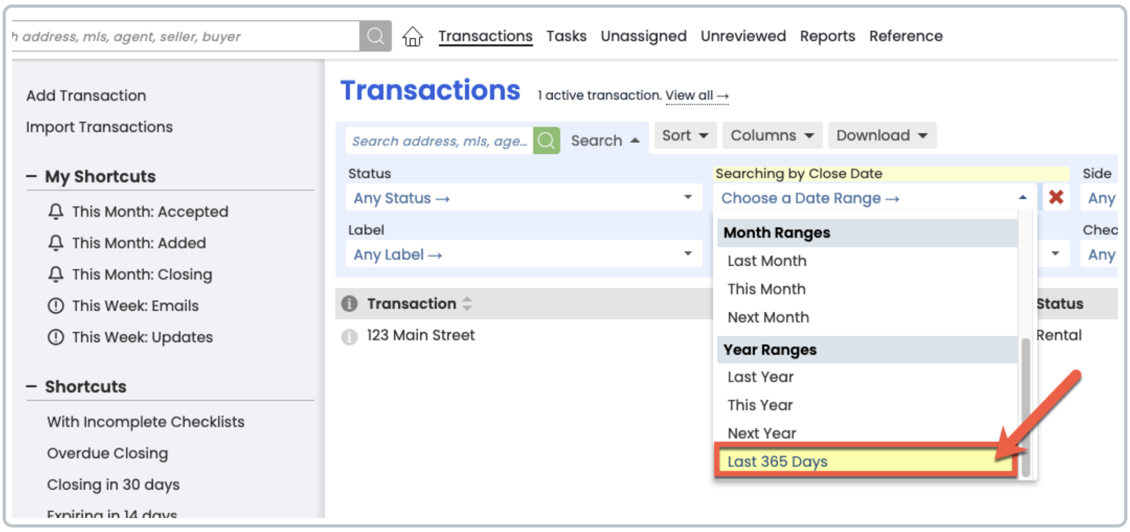
What's New (December 19, 2021)

SEARCHING & FILTERING

Assess your company's performance based on rolling 365 days: All reports and Transaction List searches now offer a "Last 365 Days" option. Combine this new option with all the existing search and filter options to target and view the exact data you need to see.



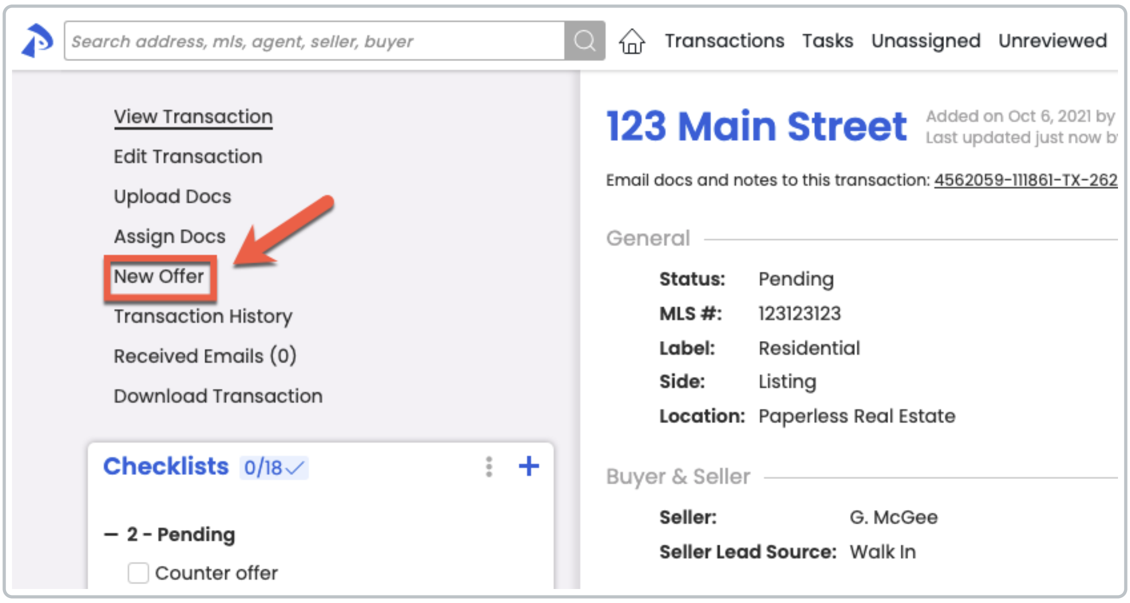
Learn more about Searching & Filtering Transactions here →

ADMIN CONTROLS

Never forget to update agents' commission info on their anniversary: If you'd like admins to be automatically reminded to update agents' commission split information on their anniversary, head over to Company Settings and check "Email admins agent anniversary reminders". When checked, location and master admins will receive an email reminder 5 days before each user's Start Date anniversary.

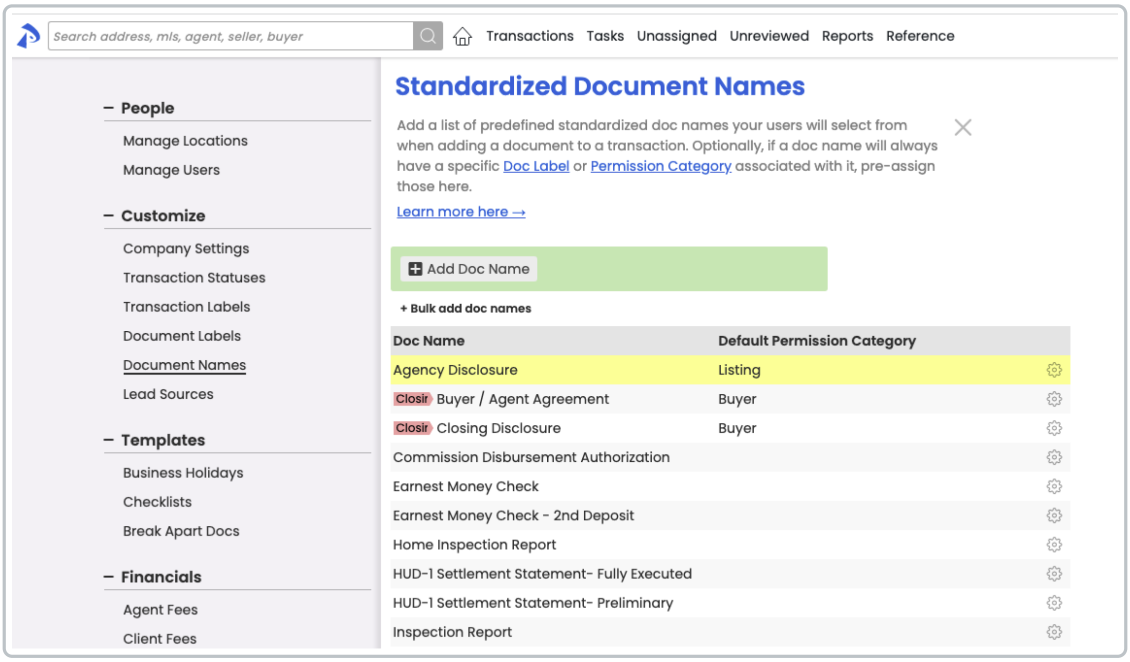
Learn more about Managing Agent Commission Splits here →

No confusion about when New Offers can be created: The option to add a new offer has been removed until it's an appropriate time. If you have the "Allow New Offer" feature enabled in your account, going forward, the New Offer option will only show on the left menu of transactions if that transaction is in a Pending or later status. That way, agents won't accidentally add a new offer without first entering the original offer into the main transaction.



[Learn how to Create a New Offer here →]

Associate document names with labels and categories once. Reap the benefits forever: Each time a document is added to a transaction, it can now take on the doc label and permission category pre-associated with the document's name. Pre-associating labels and categories to doc names will save your team the time of having to set them manually as each doc is added.

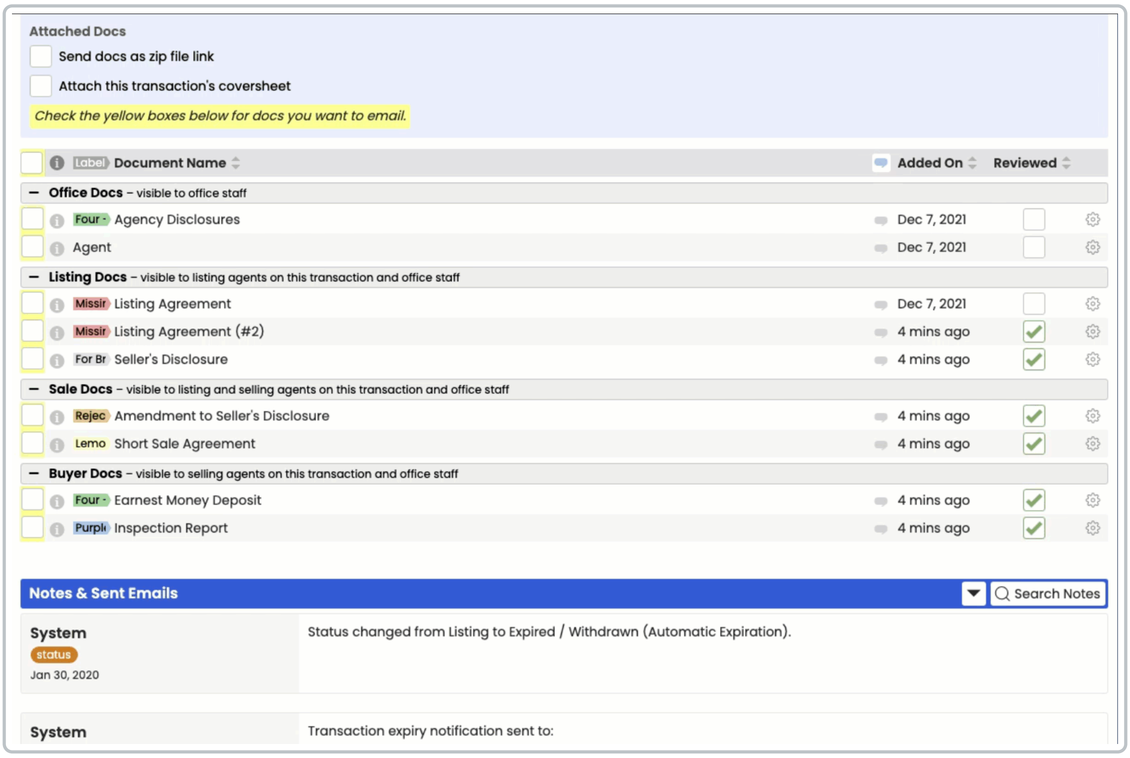


[Learn more about Setting Up Standard Doc Names here →]

For offices that don't track compliance in Pipeline, remove Review from your view: If your office doesn't track compliance in Pipeline (e.g., TC offices, Teams, etc.), you can now disable the Document Review feature to remove the unneeded fields and extra effort involved in marking docs as reviewed. To turn off review, uncheck "Enable Reviewed Docs functionality" on the Company Settings page.

PRO TIPS & SHORTCUTS

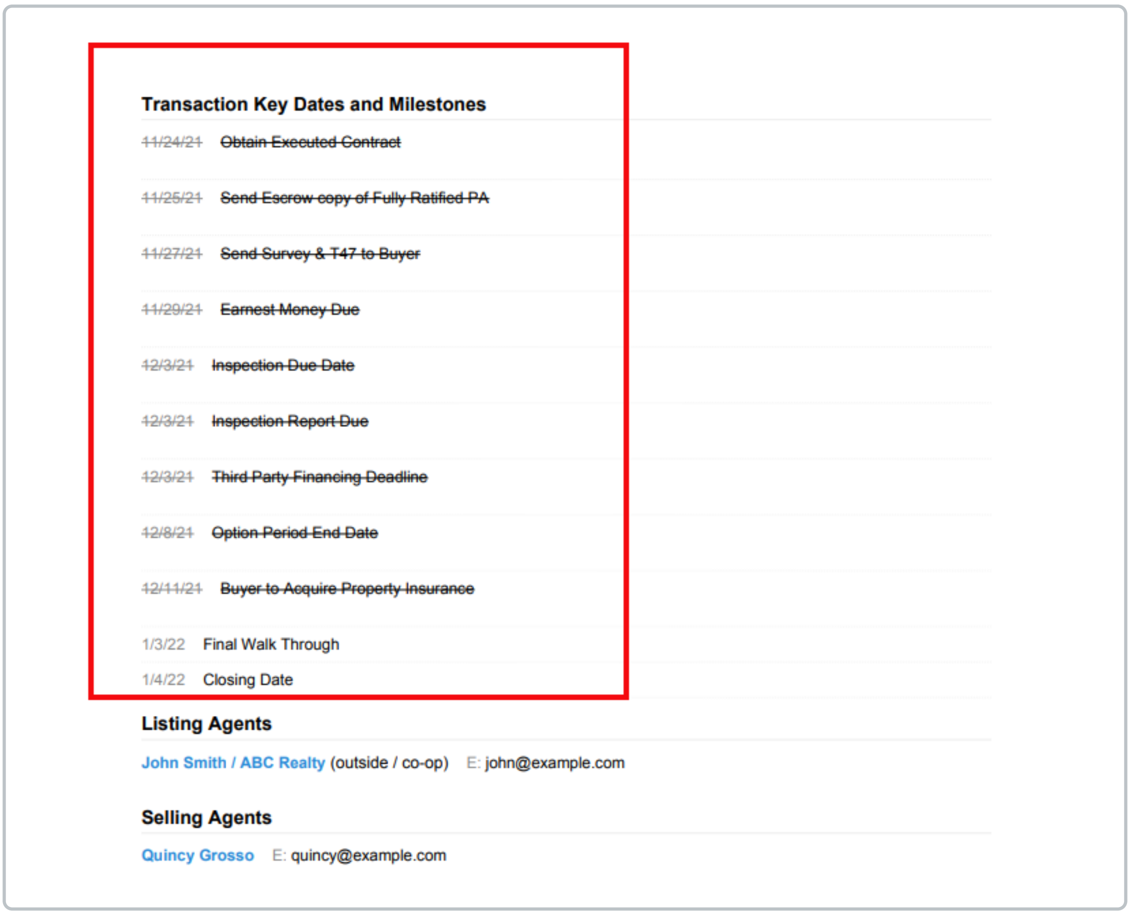
Quick-select all docs in a category when sending docs: When sending a message from within Pipeline, quickly select all docs within a category by holding down the [Shift] key on your keyboard, then clicking any doc within the category. All docs in that category will be selected. You can individually deselect any that shouldn't be sent or [Shift]+click again to deselect all docs in the category.



Learn more about Emailing Docs and Notes from Transactions here →

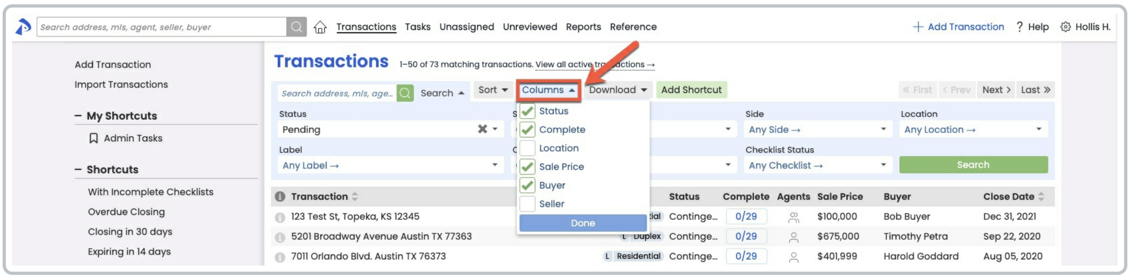
OTHER FEATURES

Track and share key dates effortlessly: You can now designate tasks as important timeline dates that can be displayed on your cover sheets, synced to calendars, and autofilled into emails and message templates.



[Learn more about Setting and Using Key Dates here →]

Avoid click-thru by viewing Sale Price, Buyer, and Seller from your Transactions List.: If your workflow will be helped by viewing Sale Price, Buyer, or Seller on your Transactions List, enable them under the Columns tab.

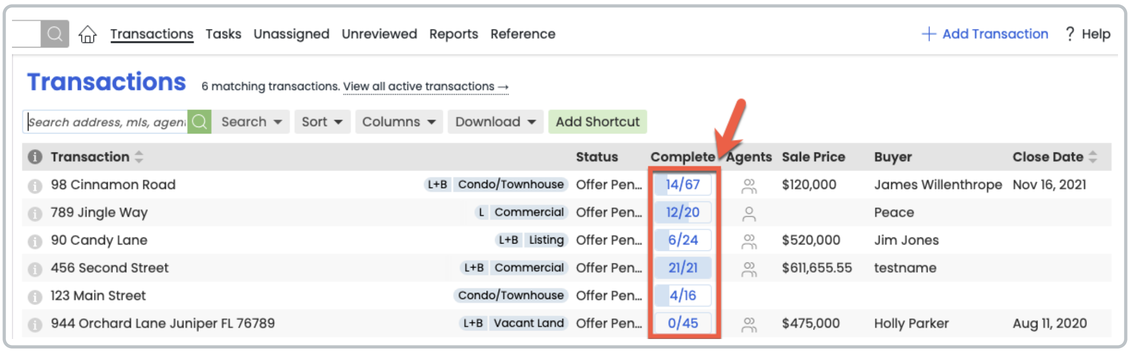


[Learn how to Show and Hide Columns on the Transactions List →]

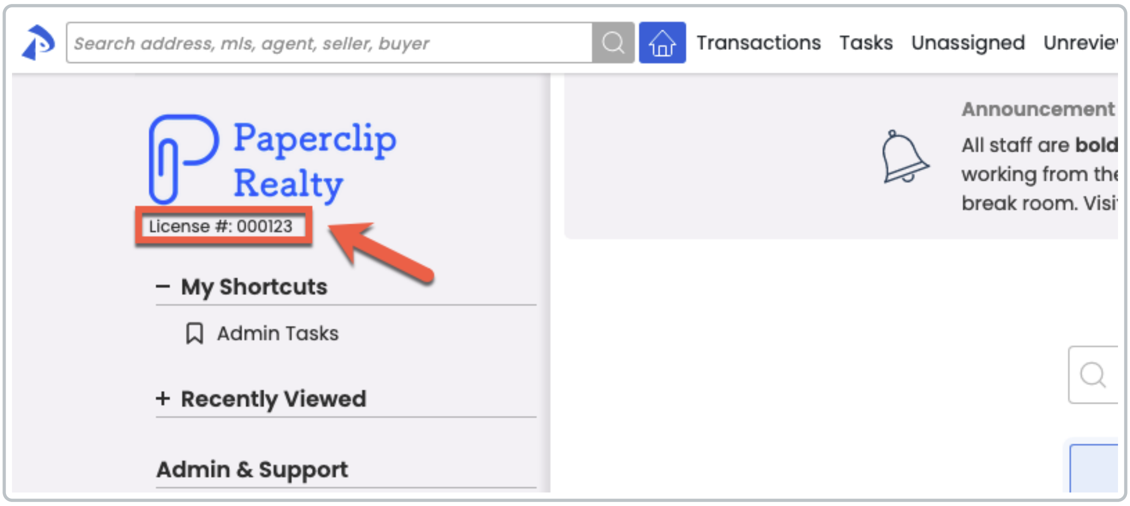
Know the stage of a transaction at-a-glance: Transactions now display key stages in the upper right corner of each transaction as that transaction progresses through its life cycle. Key stages include:

- Days on Market
- Days since Accepted
- Days to close

New look for completion ratio meter: The completion ratios displayed on the Transactions List have a new look. The ratios have stayed put, but their background is now a single blue color that's appropriately filled in based on how complete the transaction's checklist is.



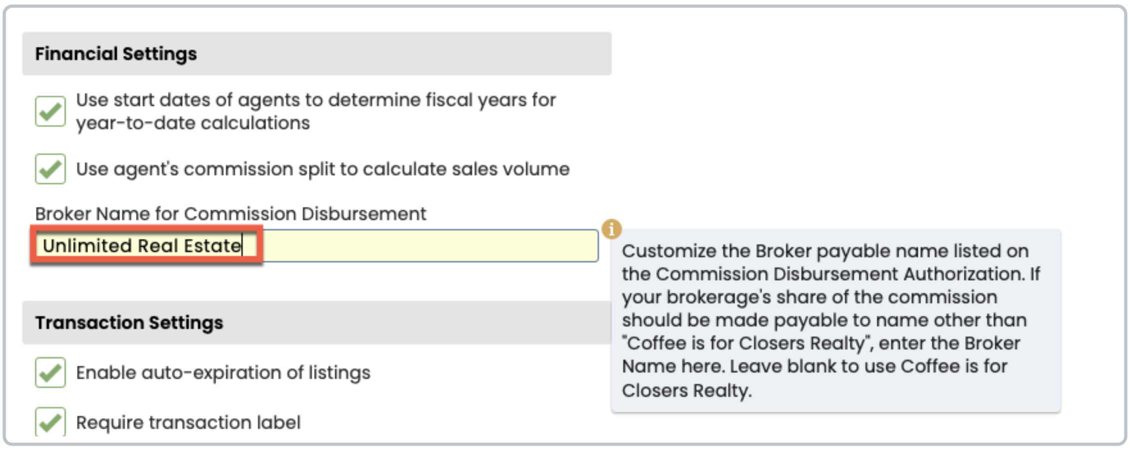
Broker license number at your fingertips: Your broker license number is now displayed for all users under your company's logo on the home page.



Add your broker license number here →

COMMISSION MODULE

For Teams: Set the proper payee name for your broker payables: If you're a Team who needs the Broker Payables on CDAs to reflect your brokerage's name instead of your team's company name, enter their brokerage name in the CDA Settings' "Broker Name for Commission Disbursement" field. That name will be properly reflected as the Payee for any brokerage payables throughout the Manage Commissions process and on the CDA.



Financial Settings

- [x] Use start dates of agents to determine fiscal years for year-to-date calculations
- [x] Use agent's commission split to calculate sales volume

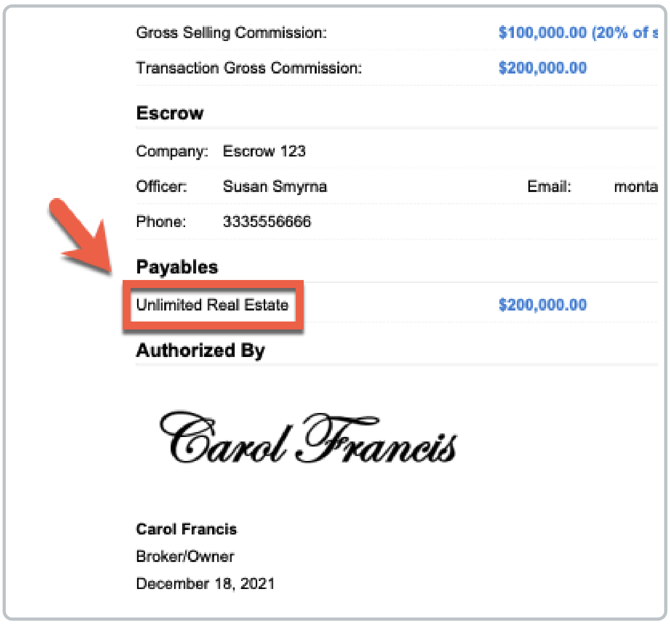
Broker Name for Commission Disbursement

Unlimited Real Estate

Customize the Broker payable name listed on the Commission Disbursement Authorization. If your brokerage's share of the commission should be made payable to name other than "Coffee is for Closers Realty", enter the Broker Name here. Leave blank to use Coffee is for Closers Realty.

Transaction Settings

- [x] Enable auto-expiration of listings
- [x] Require transaction label



Gross Selling Commission:	$100,000.00 (20% of s
Transaction Gross Commission:	$200,000.00

Escrow

Company: Escrow 123

Officer: Susan Smyrna Email: monta

Phone: 3335556666

Payables

Unlimited Real Estate	$200,000.00

Authorized By

Carol Francis

Carol Francis

Broker/Owner

December 18, 2021