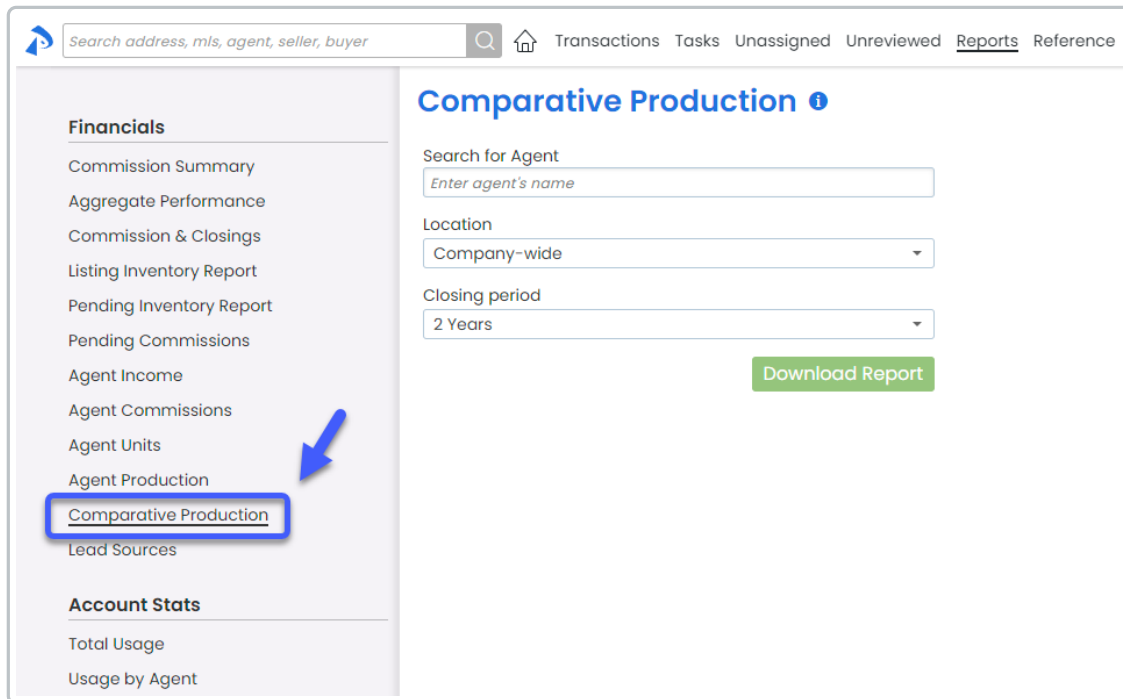


## What's New (May 22, 2022)

Compare performance year over year

The new Comparative Production Report allows you to measure seasonal performance by comparing figures for any given month across multiple years, as well as annual totals. Monthly and annual figures are included for sales volume, sales average, number of transactions, and (for Commission Module subscribers) sales units.

[Learn more about the Comparative Production Report here→](#)



The screenshot shows a web application interface. At the top, there is a search bar with the placeholder text "Search address, mls, agent, seller, buyer" and a magnifying glass icon. To the right of the search bar are navigation links: "Transactions", "Tasks", "Unassigned", "Unreviewed", "Reports", and "Reference". Below the search bar is a sidebar menu with two main sections: "Financials" and "Account Stats". Under "Financials", there are several items: "Commission Summary", "Aggregate Performance", "Commission & Closings", "Listing Inventory Report", "Pending Inventory Report", "Pending Commissions", "Agent Income", "Agent Commissions", "Agent Units", "Agent Production", "Comparative Production", and "Lead Sources". The "Comparative Production" item is highlighted with a blue box and a blue arrow points to it. Under "Account Stats", there are "Total Usage" and "Usage by Agent". The main content area is titled "Comparative Production" with an information icon. It contains a "Search for Agent" field with the placeholder "Enter agent's name", a "Location" dropdown menu set to "Company-wide", and a "Closing period" dropdown menu set to "2 Years". A green "Download Report" button is located below the dropdowns.

Share checklist timelines effortlessly

You can now easily download and share a spreadsheet of your checklist timelines and their associated information with agents, team members, or clients (for TCs). Hover over a checklist title then click the download icon to download timeline happiness!

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed

**789 Third Street** Added on Feb 3, 2022 by  
Last updated May 4, 2022

Email docs and notes to this transaction: [4562059-111861-TX-2752](mailto:4562059-111861-TX-2752)

**General**

**Status:** Pending  
**Side:** Listing  
**Location:** Paperless Real Estate

**Buyer & Seller**

**Sale & Commission**

**List Price:** \$250,000  
**Sale Price:** \$235,000

**Contingency Dates**

**Inspection Date:** May 13, 2022

**More Info**

Enter the required information:

🏠 - Y / N?

**Listing Agents**

Betty Stone [ho](mailto:ho)

Note / Email Add Contact Merge Docs

Label Document Name

**Checklists** 31% ✓

**Pending Sale**

- Inspection 5/13
- Property Inspection Report 5/18
- Termite Report 5/18
- Appraisal Report
- Commission Disbursement Authorization 5/8
- Home Warranty Application 5/18
- Request for Mortgage Information
- Closing Disclosure 6/2
- Final Walk Through 6/2
- Show completed tasks →

Add doc name or task

**Pro tip:** To quickly expand all columns in Excel to match the width of a your specific timeline's data, click the upper left master cell, then double-click any column separator.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transactio

**789 Third Street** Added on Feb 3, 2022 by Hollis Holcomb  
Last updated just now by Hollis Holcomb

Email docs and notes to this transaction: [4562059-111861-TX-2752@docs.paperlesspipeline.com](mailto:4562059-111861-TX-2752@docs.paperlesspipeline.com)

**General**

**Status:** Pending **Listed On:** Apr 7, 2022  
**Side:** Listing **Accepted On:** Apr 28, 2022  
**Location:** Paperless Real Estate **Closes On:** Jun 3, 2022

**Buyer & Seller**

**Sale & Commission**

**List Price:** \$250,000 **Total Commission:** \$7,050  
**Sale Price:** \$235,000

**Contingency Dates**

**Inspection Date:** May 13, 2022

**More Info**

Enter the required information:

🏠 - Y / N?

**Listing Agents**

Betty Stone [hollis+tcystone@paperlesspipeline.com](mailto:hollis+tcystone@paperlesspipeline.com) 404-555-0188

Note / Email Add Contact Merge Docs Upload Docs

Label Document Name Added On Review

**Checklists** 31% ✓

**Pending Sale**

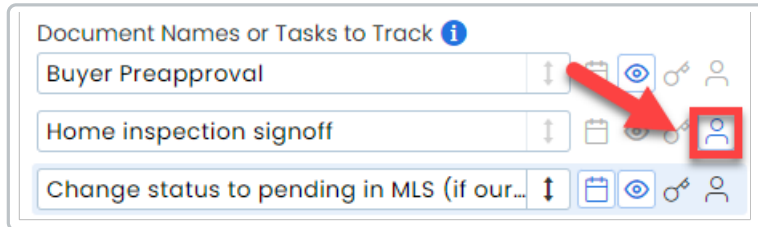
- Inspection 5/13
- Property Inspection Report 5/18
- Termite Report 5/18
- Appraisal Report
- Commission Disbursement Authorization 5/8
- Home Warranty Application 5/18
- Request for Mortgage Information
- Closing Disclosure 6/2
- Final Walk Through 6/2
- Show completed tasks →

Add doc name or task

[Learn how to Download a Transaction Checklist here →](#)

Let agents update task dates they know most about

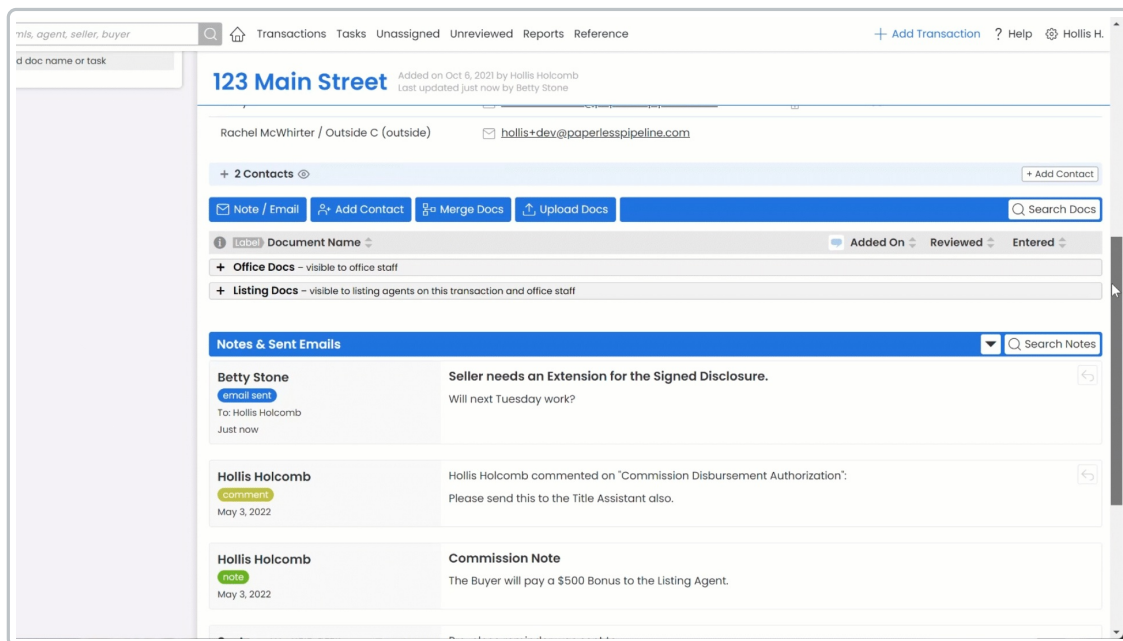
You can now allow agents to change the due dates of non-compliance tasks. From Checklist Templates, designate non-compliance tasks whose due dates are appropriate for agents to update by clicking the Agent icon next to the task.



[Learn how to Allow Agents to Change a Task's Due Date →](#)

Reply to messages with a single click

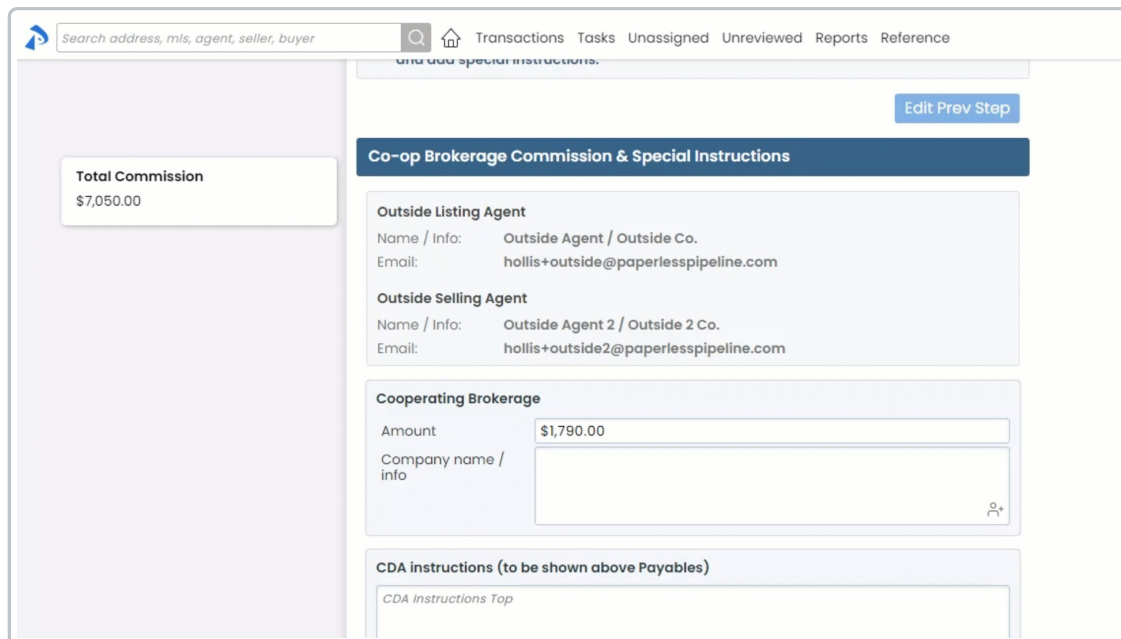
Quickly reference a message you're responding to in Pipeline by replying to it directly. From the Notes & Sent Emails section, click the Reply icon of any eligible message or comment to reply to the sender and optionally add other recipients.



[Learn how to Reply to Emails in Pipeline →](#)

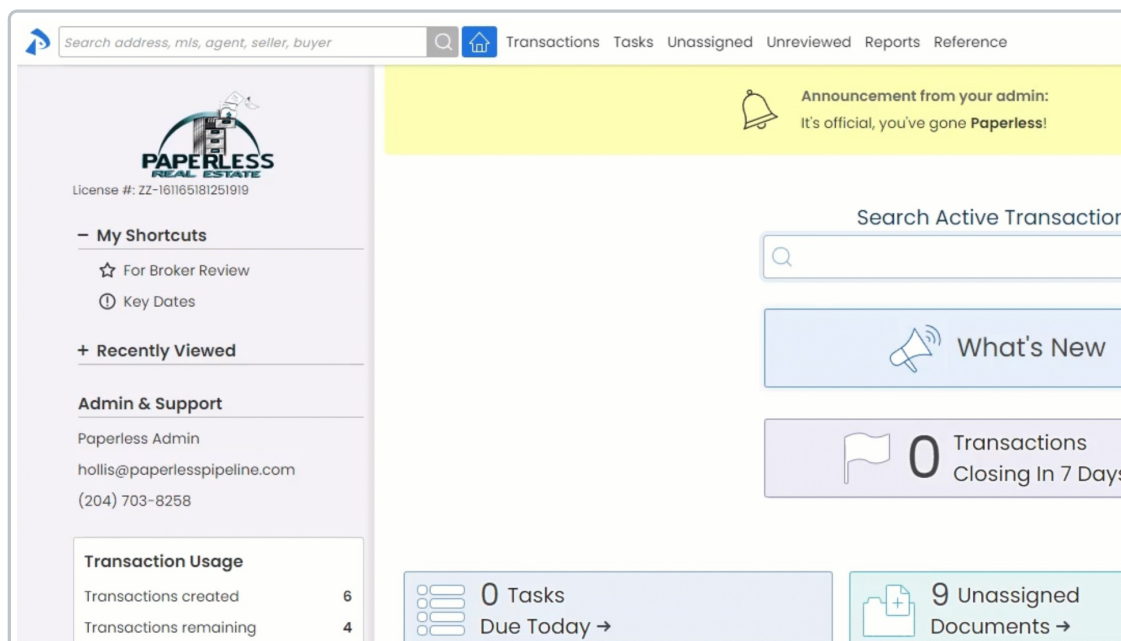
Insert contact info with a single-click when managing commissions

Inserting contacts to receive deductions or co-op commissions while managing commissions is now as easy as a single click. From the Fees & Deductions and Co-op Brokerage sections, click the people icon in the lower right corner of the field to quickly select and insert contacts from the transaction.



Find contacts by their company name

The new "contact-company" global search option allows you to search for contacts based on their company name.



[Learn more about Searching, Sorting, and Downloading here →](#)

Cover Sheets can now include address, phone, etc.

The address, phone number, fax number, and email address of locations can now be displayed on coversheets. Access these details from the Admin menu under Manage Locations by clicking the gear icon next to a location, then Edit Location. If you subscribe to the Commission Module, you've already been enjoying this feature since those location details were already set for any locations that have CDA settings set...they've now just been moved under Edit Location.

Search address, mls, agent, seller, buyer Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help Hollis H.

### Manage Locations

+ Add Location

Location	Active Users	Transactions	Unassigned Docs	Has Commission ...	Active
Bluffington Team	0	0	0		✓
Paperless Real Estate	3	6	9		

- Edit Location
- Commission & CDA Settings
- Deactivate

Search address, mls, agent, seller, buyer Transactions Tasks Unassigned Unreviewed

## Edit Bluffington Team

**Name**

Location Name  
Bluffington Team \*

**Location Contact Info**

The Location Contact Info below is shown on the transaction cover-sheet and CDA letterhead.

Address  
1300 East Main Street, Wichita, KS 67208 \*

Phone  
555-555-5556 \*

Fax

Email  
admin@paperlesspipeline.com

Cancel Save Settings

- People
  - Manage Locations
  - Manage Users
- Customize
  - Company Settings
  - Transaction Statuses
  - Transaction Labels
  - Document Labels
  - Document Names
  - Lead Sources
- Templates
  - Business Holidays
  - Checklists
  - Break Apart Docs
- Financials
  - Agent Fees
  - Client Fees
  - Deductions
  - Commission Basis
- Backups
- Billing

**Paperless Real Estate**  
 1300 East Main Street, Wichita, KS 67208  
 Phone: 555-555-5556 Email: admin@paperlesspipeline.com

**Coversheet for 234 Arrow Road**

**Transaction Info**

Property Address: [234 Arrow Road](#)

Label:	<b>Land and Lot</b>	Location:	<b>Bluffington Team</b>
Status:	<b>Pending</b>	Total Commission:	<b>\$10,500</b>
Side:	<b>Listing</b>	Added On:	<b>Feb 3, 2022</b>

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

Drill down further into active transaction searches

Ever need to search for transactions that are active (not closed, fell through or expired) along with other search criteria? Now you can! The new All Active and All Inactive search options allow you to build off of those active/inactive statuses as a starting point, allowing you to more easily search for exactly the transactions you need to see.

Search address, mls, agent, seller, buyer

**Transactions** 4 active transactions. [View all →](#)

Search address, mls, age... Search Sort Columns Downk

Status

- Any Status →
- Closed
- Fell Through
- Auto Expiry
- All Transactions
- All Active
- All Inactive

Search by Date Range...  
 Choose a Date Type →  
 Commissions  
 Commissions →

Complete	Agents	Loc
14 / 27	0	Blu
11 / 19	0	Pa
3 / 10	0	Pa

[Learn more about Searching, Sorting, and Downloading here →](#)

Help your team know what commission info to gather

You can now insert default information into the Commission Summary field of new transactions (exactly as you can with the More Info and Admin Info fields). From commission percents to referral fees to whatever info you regularly gather in that field, enter placeholder prompts that will remind your team to enter the information needed. Set your default on the Company Settings page→

Pre-filled default value for "Commission Summary" field

Earnest Money Amount - \$  
Commission Percent - \$  
Broker Commission - \$  
Referral Fee - \$

[Learn how to Set a Default Value for Transaction Fields →](#)