

What's New (July 17, 2022)

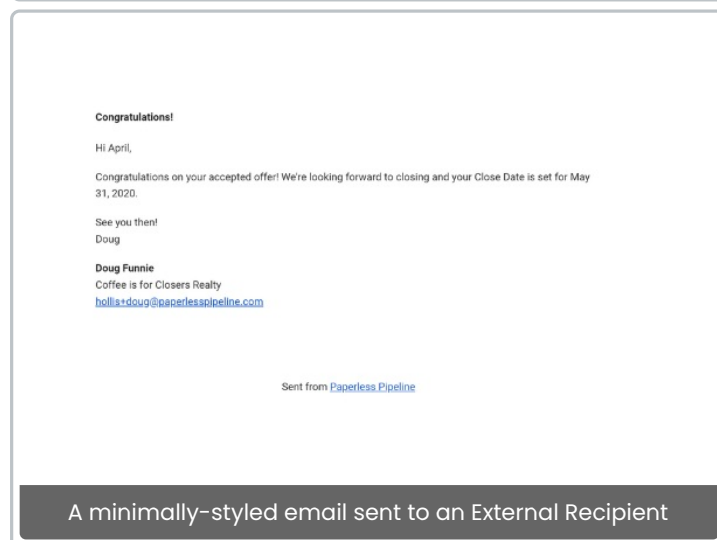
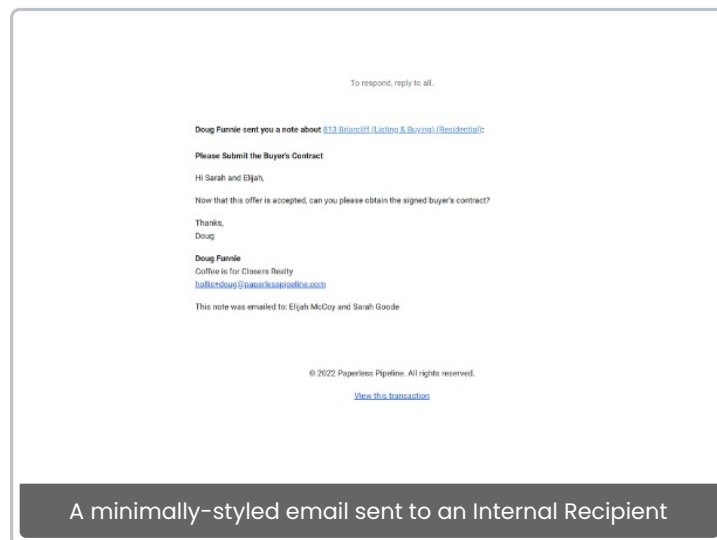
Selling Agent is now Buying Agent

For consistency and accuracy, we've updated all instances of the term "Selling Agent" to "Buying Agent" throughout the system. If you used any "Selling Agent" auto-fill tags in any of your message templates, they'll still be honored.

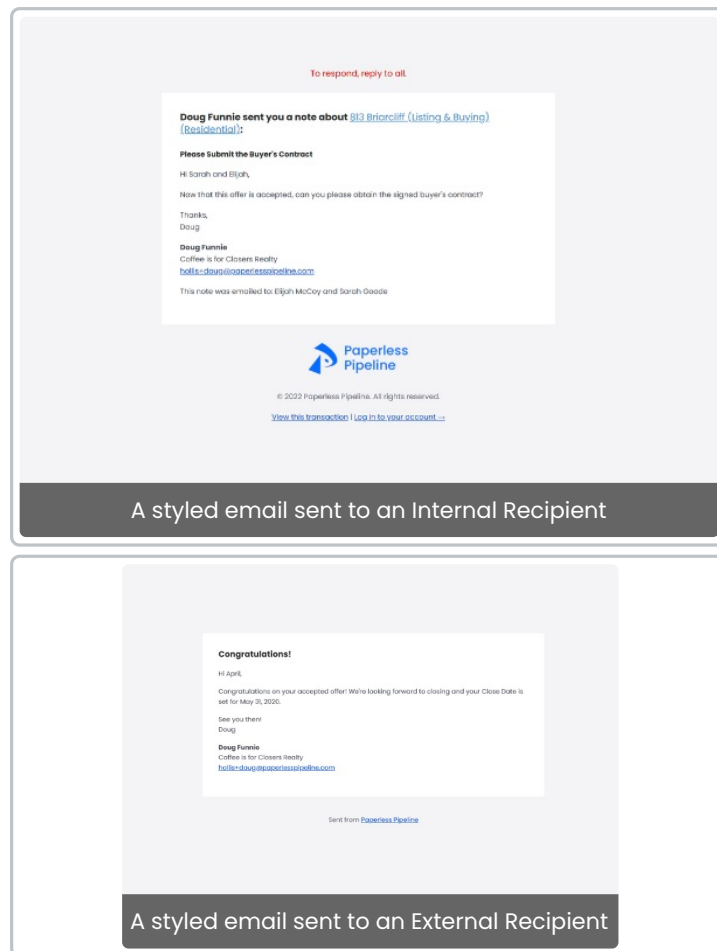
Email formats have been enhanced (and un-enhanced☺)!

You've asked for minimally-styled emails that look like they've come from a standard email system and now you've got the option! Set your account to either send simple, minimally-styled messages from transactions OR send a more styled version. All system messages have received an overhaul, as well, so they're more modern, cleaner, and easier-to-read than ever. [Learn more here →](#)

Minimally-styled emails



Styled emails



YTD popup now reflects transactions for an entire fiscal or calendar year

When managing commissions, all closed transactions with a CDA **from the fiscal or calendar year of the current transaction's close date** will be included in agents' YTD popup. In the past, only transactions through the current transaction's close date would be included, omitting any that were closed after that transaction's close date but still within the year.

[Learn more about Agent's YTD Pop-up here →](#)

Sort contacts in the order that helps you easily find them

Sort contacts on transactions so you can quickly jump to the person you need see. Sort by role, Company/Address, Name or the Order they were added, whichever helps you find your contacts the quickest. Pipeline will remember your sort preference when you view transactions later.

813 Briarcliff Added on Apr 27, 2020 by Hollis Holcomb
Last updated 23 minutes ago by Hollis Holcomb

More Info _____ Admin Info (only visible to admin staff) _____

Lock Box: #1919 Agent paying transaction fee for Seller

Listing Agents Ⓞ

Elijah McCoy ✉ hollis+elijah@paperlesspipeline.com ☎ 555-555-5555

Buying Agents Ⓞ

Sarah Goode ✉ hollis+sg@paperlesspipeline.com

— 5 Contacts Ⓞ ⬆ Order Added ▾ + Add Contact

Monta Cupcake, **Referrer** ✉ monta+cupcake@paperlesspipeline.com ☎ 2225552222
Cupcake Central
April is a regular at Cupcake Central. When they learned she wanted to move, they referred her to us!

Odysseus Davis, **Property Inspector** ✉ hollis+odie@paperlesspipeline.com ☎ (237) 912-2639
Odie's Property Inspection Company / 717 Main Street

Jack Nicklaus, **Attorney** ✉ hollis+try@ohholcomb.com ☎ (588) 931-5135 🖨 (744) 736-7304

[Learn more about Sorting Contacts →](#)

Agents can easily let admins know when a task is not applicable

Agents can now effortlessly communicate to an admin when they've determined a task is not applicable for a transaction. Train agents to SHIFT-click any task's checkbox to give them the option to mark the task as N/A. Like agent-checked tasks, not applicable tasks:

- **Will no longer** appear on agent's Task page or in their task reminder emails
- **Will be displayed** on admins' Task page for easy access to tasks needing their attention.

Admins may either:

- Mark N/A tasks as complete by checking them off (they will remain crossed out to indicate they were marked as N/A, even after fully checked)
- Delete N/A tasks if they'd like to remove them from view completely

Search address, mls, agent, seller, buyer Transactions Tasks Unassigned Reports Reference

Checklists ⌵

— Pending checklist

☐ Fully signed seller's property disclosure

☐ Conditional loan approval (if financing involved)

☐ Preliminary title report

☐ Executed Counter

☐ Purchase contract

☐ Agency disclosure

☐ Pre-Approval (if financing involved)

☐ Home Inspection signoff

☐ Final walk through signoff

— Listing checklist

☐ Lead-based Paint Disclosure (if applicable) 4/29

☐ Lockbox Keys 6/1

☐ Listing Agreement 4/14

☐ Mold Disclosure 5/12

☐ MLS Information 5/12

813 Briarcliff Added on Apr 27, 2020 by Hollis Holcomb
Last updated 14 minutes ago by Hollis Holcomb

Side: Listing & Buying
Location: Old Pine

Seller & Buyer _____

Sale & Commission _____
Sale Price: \$500,000

More Info _____
Lock Box: _____

Listing Agents Ⓞ

Kristian Keane ✉ kristiankeane@gmail.com ☎ 456-456-5555 🖨 987

Carlisle Lilly ✉ carlisle@paperlesspipeline.com

Buying Agents Ⓞ

Kristian Agent ✉ carol+agent1@paperlesspipeline.com 🖨 567

Rosemary Laucala ✉ rosemarylaucala@paperlesspipeline.com ☎ 555-555-5555

— 5 Contacts Ⓞ ⬆ Order Added

Monta Cupcake, **Referrer** ✉ monta+cupcake@paperlesspipeline.com ☎ 2225552222

[Learn more about Checking Off Tasks →](#)