

What's New (February 12, 2023)

Sends docs out for DocuSign signature faster and easier

Short version:

You can now send docs out for DocuSign signature directly from within Paperless Pipeline. Re-connect to DocuSign from your *Personal Profile* page, then when you send docs for signature from *Reference* or transactions, you'll do so without leaving Pipeline. Continue to view executed docs in DocuSign or import them back into Pipeline from *Unassigned Docs*.

Details:

You can now send docs out for DocuSign signature directly from within Paperless Pipeline, saving you the time and effort of having to send them to DocuSign, then visit DocuSign to send them from there.

To get started, you'll need to login to DocuSign from within Pipeline to re-establish the connection between Pipeline and DocuSign. Here's how:

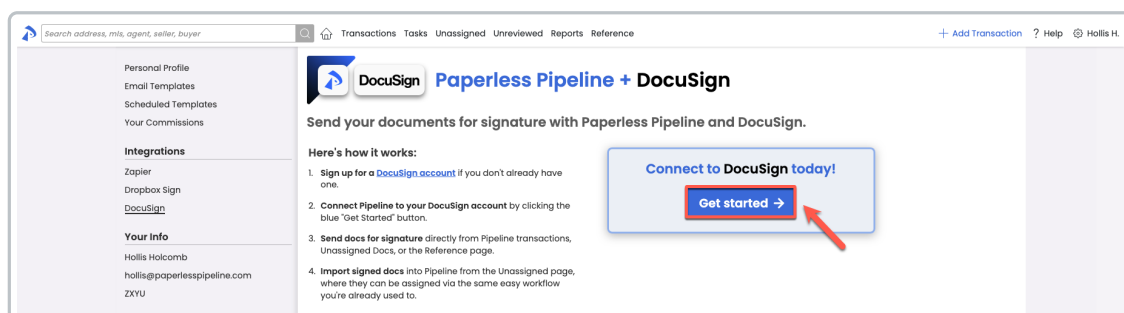
Click your name in the upper right corner of Pipeline, then [Personal Profile].

Click [DocuSign] from the *Integrations* section of the left menu.

Click [Get Started], then follow the prompts to connect to DocuSign.

Then, when it's time to send a doc for signature, click [Send to DocuSign] from transactions or from the *Reference* page, as you always have.

You'll be directed to specify your signers and signature fields, directly from within Pipeline. Once your sent docs are fully executed, as before, you can either view them in DocuSign, or import them back into Pipeline from the *Unassigned Docs* page. In the near future, those docs will be drawn back into Pipeline automatically.



Copy recipients privately when sending messages from within Pipeline

You can now add BCC (blind copy) recipients when sending message from within Pipeline. Click the BCC option to the right of the *Recipients* section to activate the field for any message.

Transactions Tasks Unassigned Unreviewed Reports Reference [+ Add Transaction](#) [? Help](#)

123 Main Street Added on Jun 30, 2022 by Hollis Holcomb
Last updated 2 hours ago by Hollis Holcomb

248 Days on market

Jack Stewart, Attorney
Stewart Closings

[✉](#) [+ Add Contact](#) [≡ Merge Docs](#) [⬆ Upload Docs](#) [🔒](#)

Email this message to:

☐ Listing agents ☐ Buying agents

☐ Elijah McCoy ☐ John Jacob

Staff (11)

☐ December Release ☐ January Tester
☐ Kristian Keane ☐ Kyn Holco
☐ Misha March ☐ Monta Test It Fleming
☐ Professor Plum (Agent) ☐ Rachel McWhirter
☐ Rajesh Dhawan ☐ Ramu Tremblay
☐ Roger Klotz

Send to an external email address ⓘ

[+ bcc](#)

Subject ⓘ [Add autofill tag](#) [Message Templates](#)

Message [Audio Message](#) [Add autofill tag](#)

[Autofill tag help](#) [Formatting tips](#)

Options

Download a custom list of users

The download option on the *Manage Users* page will now download whichever users are included in your current set of results. This will allow you to include or exclude inactive users or download a list of specific users, saving you from any filtering after-the-fact. To download, from *Manage Users*, Search, filter, or use the existing list of users, then click [Download Users] and follow the prompts.

[🔍](#) [🏠](#) Transactions Tasks Unassigned Unreviewed Reports Reference

Manage Users 1-50 of 257 users. [View all users →](#)

[+ Add User](#) [Download Users](#) [✉ Send Welcomes](#)

User	Email
Stolen 2 - 2	stealme2@example.com
Hank Aaron (Agent)	hollis+hank@paperlesspipeline.c
Carol Admin	carol+cake57@paperlesspipelin
Hello Agent	hollis+hs@paperlesspipeline.cor
Kyndall Agent	kyndall+devagent@paperlesspip
Carol Agent Only	carol+cake34@paperlesspipelin

People

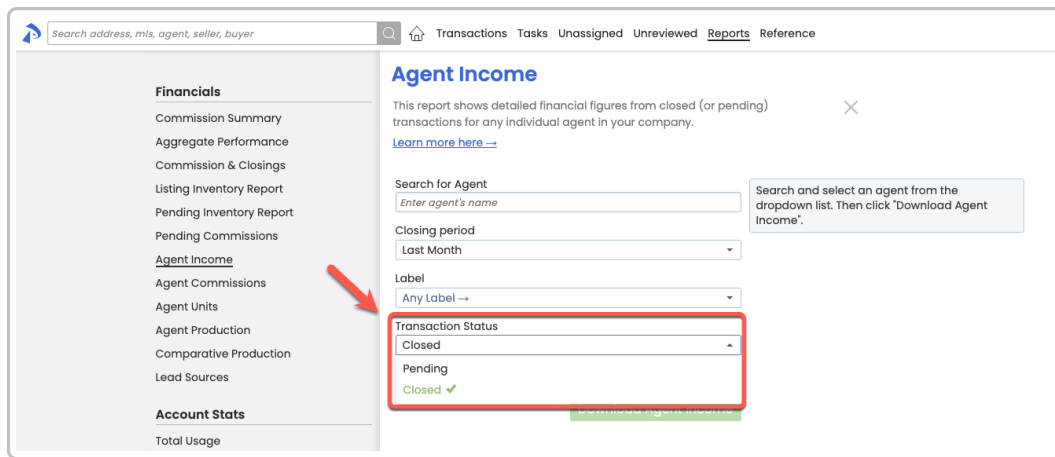
- Manage Locations
- Manage Users

Customize

- Company Settings
- Transaction Statuses
- Transaction Labels
- Document Labels

Assess agent Pending performance in a single report

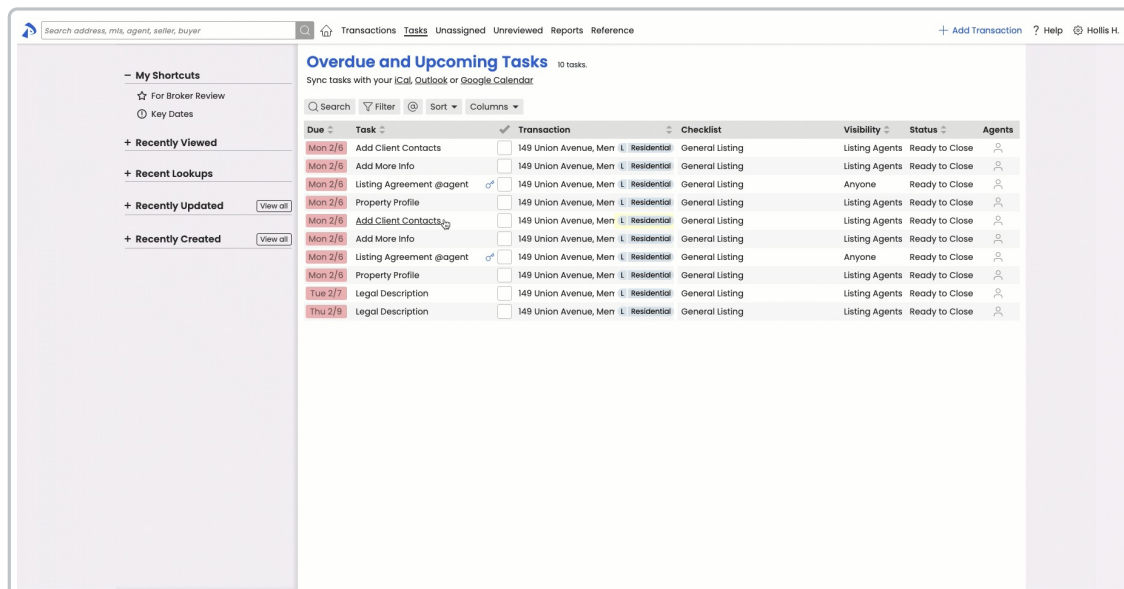
You can now report on an agent's Pending commission totals when you need to assess their productivity based on Pending transactions. With the new Transaction Status option on the *Agent Income* report, you can run the report based on Closed or Pending transactions. From the *Reports* left menu, select [Agent Income], then select whether you'd like to view Closed or Pending transactions.



Find your task instantly when clicking from the Tasks page

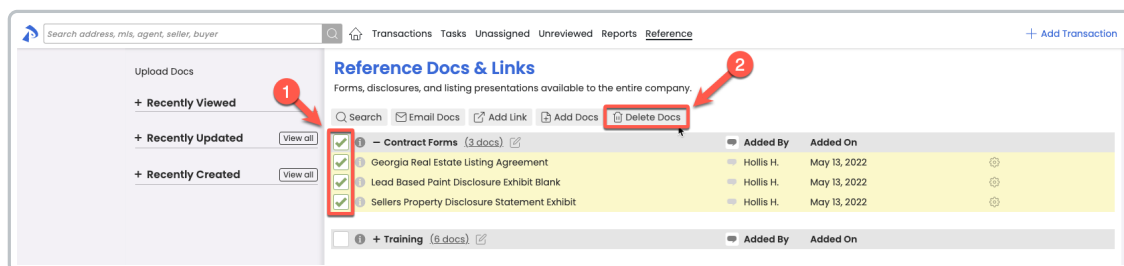
When clicking a task on the *Tasks* page, the system will now scroll straight to the task on the transaction, and highlight it so you don't have to search for it.

Note that you need to have *Checklist Scrolling* turned on for the scrolling part of this feature to work.



Save time by bulk deleting obsolete library items

Have obsolete material on your *Reference* page that needs to be removed or updated? You can now bulk delete multiple *Reference Docs* in a single action. Select multiple docs by checking each doc individually or by checking a category of docs. Then click [Delete Docs].



Save time by managing master admin access directly in Pipeline

Master admins may now fully manage the addition or removal of other master admins directly from *Manage Users*. Who is authorized to make such changes has not changed, only the ability to perform the changes directly from within Pipeline, has.

To add a master admin, an existing master admin can visit the desired user's profile, then check "Make master admin" from the "Account-wide Permissions" section.

To remove a master admin, an existing master admin can select the desired user's gear icon from the Manage Users list, then "Remove master admin"

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

Financials

- Agent Fees
- Client Fees
- Deductions
- Commission Basis

+ Backups

- Billing

- Upgrade / Downgrade
- Update Credit Card
- Billing History

+ Add-On Modules

+ Integrations

Current Plan

Transaction quota	10
Transactions created	1
Transactions remaining	9
Commission module	Free Trial

☒ Include this user in the staff recipients section of Notes

+ License # and Other Info

+ Commission Percent, Cap, & Notes, Payable Corp, Start Date

User Status

Active

User Permissions

Grant permissions below to control the specific actions this user may perform in the selected office location.

- Account-wide Permissions

- ☐ Make master admin (Review [permissions](#) before granting)
- ☐ Download company-wide backups

- Broadway Office

Transactions

- ☐ Create transactions
- ☐ Change listing/selling agents of own transaction
- ☐ Change transaction status

Make adding checklists to transactions easier by filtering out unneeded location-specific checklists

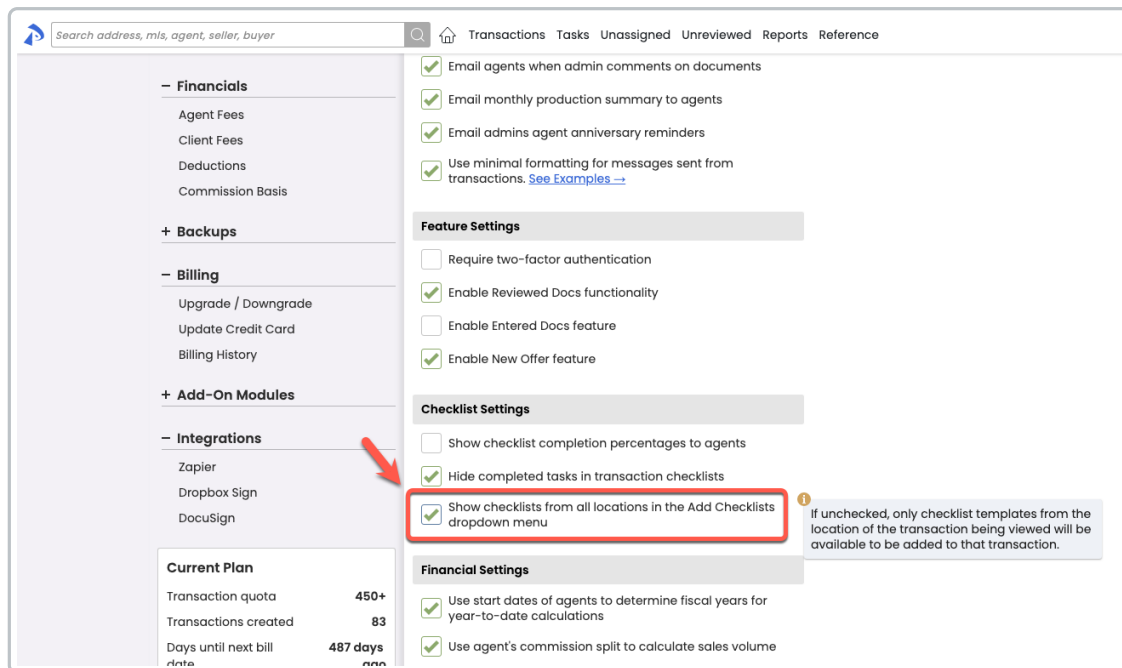
If your office has a need to only allow checklists that belong to a transaction's location to be added to that transaction, you can set your account accordingly.

This limitation is typically useful when you:

- Have more than one location
- Your checklists differ based on which location(s) they belong to
- You want to reduce the clutter of OR visibility to the checklists in the other location(s).

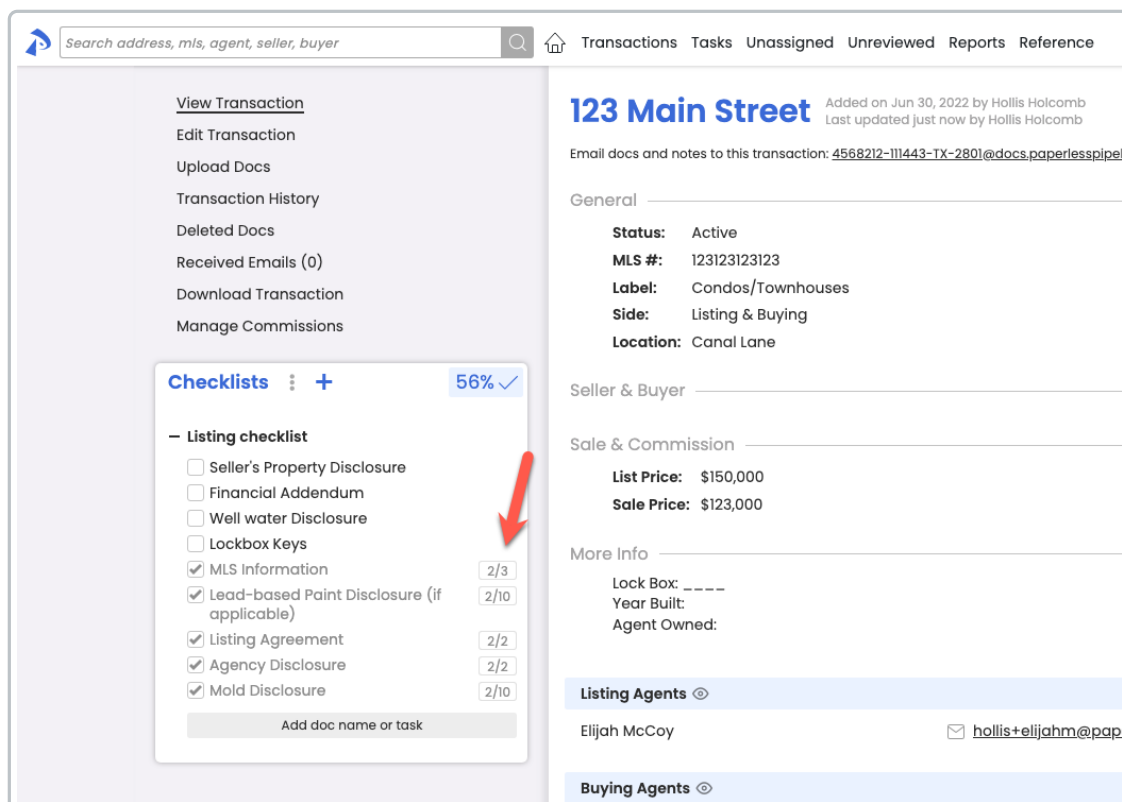
By default, all checklists are add-able to all transactions, regardless of the checklists' location. If you need to restrict that to only allow checklists from the transaction's location to be added, from [Company Settings](#), uncheck "Show checklists from all locations in the Add Checklists dropdown menu" then Save. The setting can be changed at any time if your needs change in the future.

As always, feel free to [setup a call](#)→ if you ever have any questions about the setup of your checklists or feel they might benefit from a tune-up.



Know a completed task's original due date at-a-glance

The due dates of tasks will now continue to be displayed even after they have been marked as complete, saving time from hovering.



COMMISSION MODULE

Determine whether agents have met their cap at-a-glance when pending transactions need to be considered

If processed *Pending* transactions should be considered when determining whether agents have reached

their commission cap, you can now set your account to consider them. On the [Company Settings](#) page, check *Display Pending transaction totals in the year-to-date commission threshold section*, then Save.

Search address, mis, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

Upgrade / Downgrade
Update Credit Card
Billing History

+ Add-On Modules

- Integrations
Zapier
Dropbox Sign
DocuSign

Current Plan

Transaction quota	450+
Transactions created	83
Days until next bill date	487 days ago
Next bill date	10/11
Commission module	Active
Total monthly charge	\$779*

Admin & Support

Rajesh Dhawan
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555-555-5555

Checklist Settings

- ☒ Enable Reviewed Docs functionality
- ☐ Enable Entered Docs feature
- ☒ Enable New Offer feature
- ☐ Show checklist completion percentages to agents
- ☒ Hide completed tasks in transaction checklists
- ☒ Show checklists from all locations in the Add Checklists dropdown menu

Financial Settings

- ☒ Use start dates of agents to determine fiscal years for year-to-date calculations
- ☒ Use agent's commission split to calculate sales volume
- ☒ Display Pending transaction totals in the year-to-date commission threshold section

Broker Name for Commission Disbursement
Unlimited Real Estate

Transaction Settings

- ☐ Enable auto-expiration of transactions in Listed status
- ☒ Require transaction label
- ☒ Allow agents to change transaction status to closed, terminated, and expired

Check this box if, during CDA generation, you want the system to display your agents' Pending Transaction totals in the YTD Commission Split Threshold section.
If unchecked, only Closed Transaction totals will be displayed.

If enabled, when you're managing commissions, you'll see both Closed totals **and** Closed+Pending totals to help you determine whether a cap has been met.

Next, we will help you distribute the broker/agent commission of \$3,412.58, followed by the referral commission of \$60.82.

Edit Prev Step

Broker / Agent Commission Disbursement

Distribute Listing Commission: \$2,468.36

1 Distribute listing gross between 2 agents

Agent	Commission Split	Commission Amount
Carol Agent Only	50%	\$1,234.19
Charles Agent	50%	\$1,234.19

2 Allocate sales volume and units

Agent	Sales Volume	Unit
Carol Agent Only	\$50,000.00	0.5
Charles Agent	\$50,000.00	0.5

3 Specify agent / brokerage splits

Agent	Brokerage	Agent	Commission Split	Commission Amount
Carol Agent Only	75%	25%	\$1,234.19	
Charles Agent	25%	75%	\$1,234.19	

Distribute Buying Commission: \$944.32

1 Allocate sales volume and units

Agent	Sales Volume	Unit
Candy Cane	\$100,000	1

2 Specify agent / brokerage splits

Agent	Brokerage	Agent	Commission Split	Commission Amount
Candy Cane	0%	100%	\$944.32	

Calculate & Continue

Charles Agent - YTD figures (Jan. 27, 2020 to Jan. 26, 2021)

Agent performance

	Closed	Closed + Pending
Closed transactions:	1	1
Closed listings:	1	1
Closed sales:	0	0
Units:	1	1
Sales volume:	\$100,000.00	\$100,000.00

Commission split threshold info

	Closed	Closed + Pending
Agent's current split:	75%	75%
Commission to brokerage before this transaction:	\$2,325.00	\$2,325.00
Next commission split threshold:	Not specified	Not specified
Agent start date:	Jan. 27, 2021	Jan. 27, 2021

Commission totals before this transaction

	Closed	Closed + Pending
Commission produced before agent/broker split	\$4,650.00	\$4,650.00
Agent gross commission:	\$2,325.00	\$2,325.00
Agent net commission:	\$2,325.00	\$2,325.00
Agent gross in-house referral commission:	\$0.00	\$0.00

Update commission split for Charles Agent →

Top performer spots now exclusively for active users

The Top Performers section of the *Aggregate Performance* report will now exclude any inactive users, giving you a cleaner picture of who your active performers are.



Coffee is for Closers Realty

Aggregate Performance

Coffee is for Closers Realty - Dec 1, 2017 to Dec 31, 2020

Performance

Agent sales volume	
Agent listing volume	
Agent buying volume	
Total units	
Listing units	
Buying units	
Number of closings	
Average sale price	
Gross commission	
Outside referral fees	

Brokerage

Commissions	
Listing-only commissions	
Buying-only commissions	
Dual-agency commissions	
Franchise Fee	
Fees & taxes collected	
Net payable	

Agents

Commissions	
Listing-only commissions	
Buying-only commissions	
Dual-agency commissions	
Fees & taxes paid	
Net commissions	
Net payable	

Top Producers by Sales Volume (\$)

1 Tom Cruise		6 Michael Angeletti	
2 Otto Phil		7 Monta Fleming	
3 Kristian Keane		8 Kristian Keane	
4 Rachel McWhirter		9 Shelly Leonard	
5 Josh James		10 Jane Smith	