# 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:

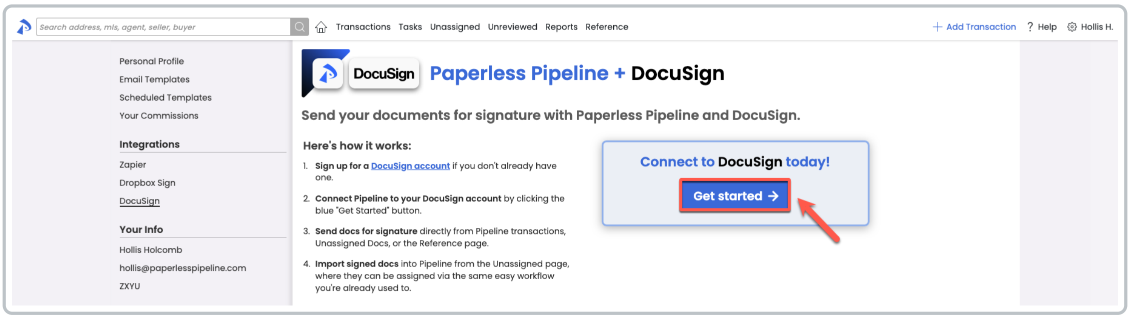
Click your name in the upper right corner of Pipeline, then [Personal Profile].

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

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

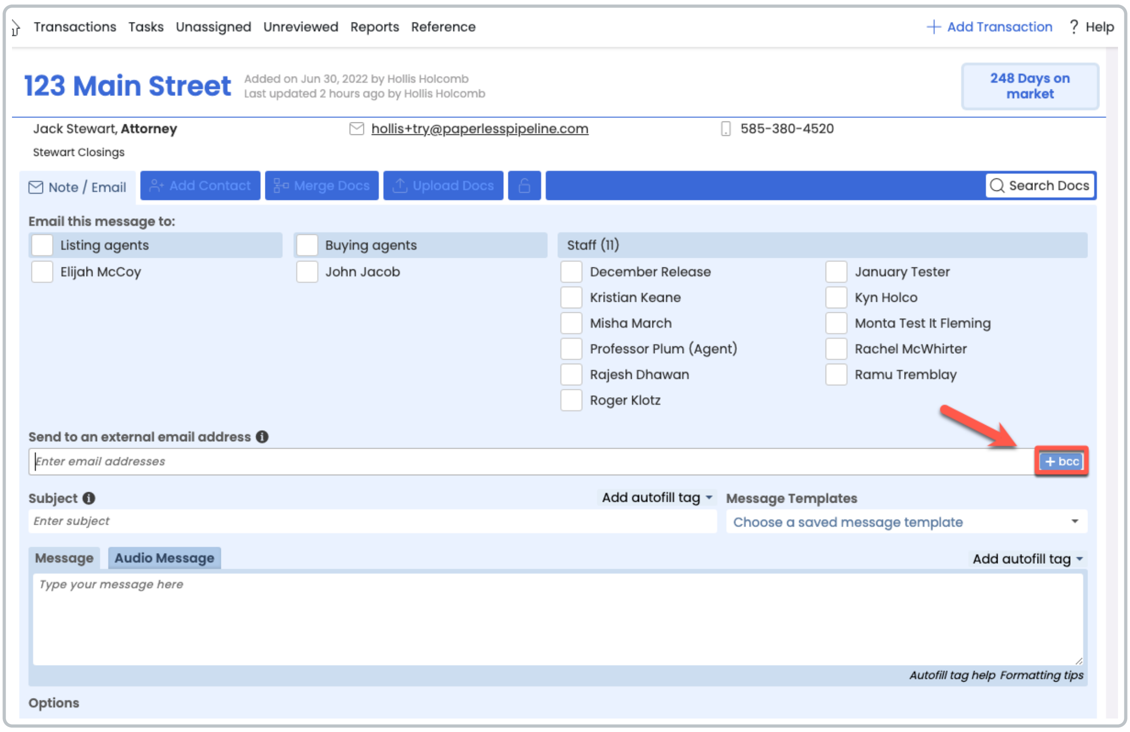
Then, when it's time to send a doc for signature, click [Send to Docusign] from transactions or from the *Reference* page, as you always have.

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.



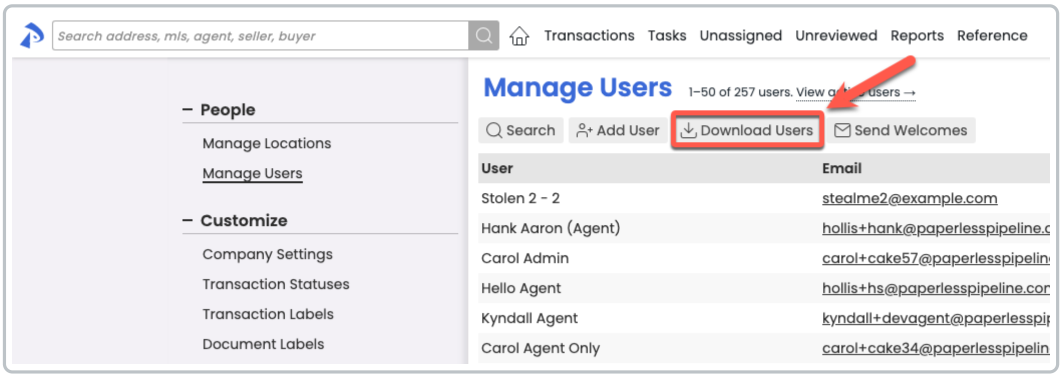

Copy recipients privately when sending messages from within Pipeline

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.



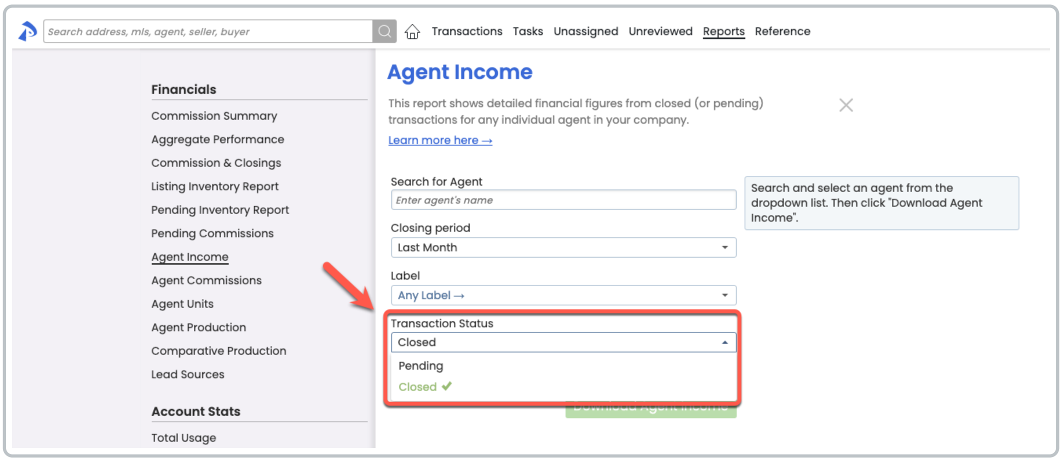

Download a custom list of users

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.




Assess agent Pending performance in a single report

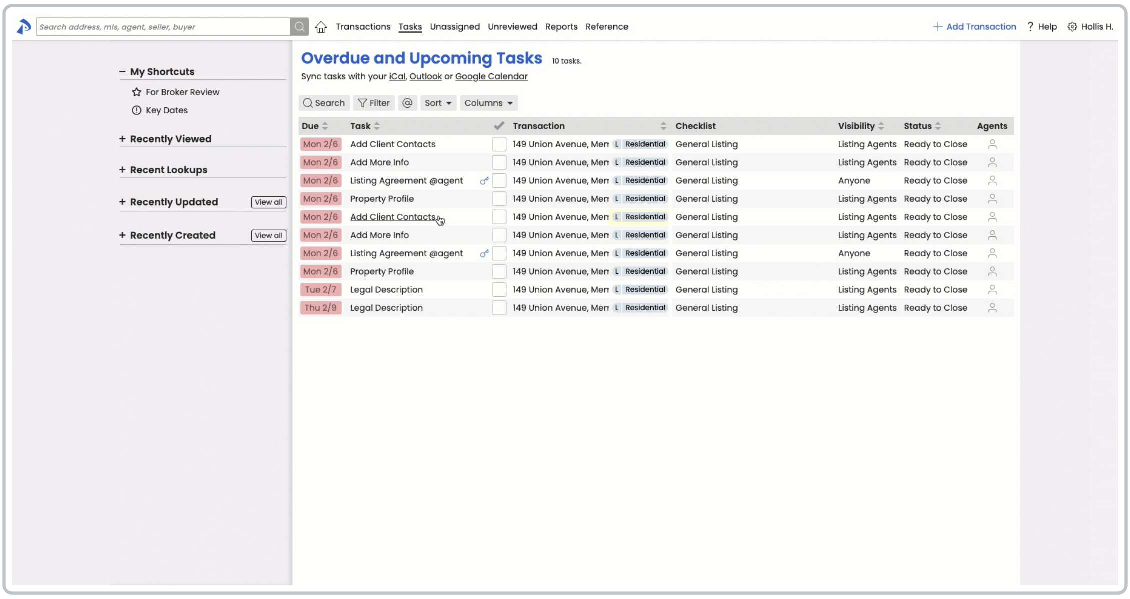
You can now report on an agent's Pending commission totals when you need to assess their productivity based on Pending transactions. With the new Transaction Status option on the *Agent Income* report, you can run the report based on Closed or Pending transactions. From the *Reports* left menu, select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




Find your task instantly when clicking from the Tasks page

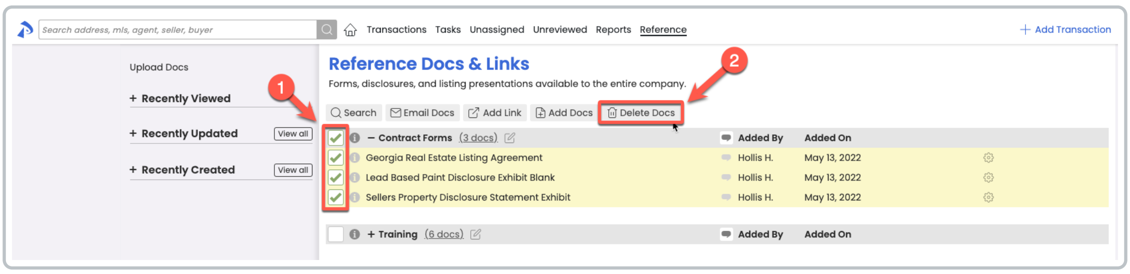
When clicking a task on the *Tasks* page, the system will now scroll straight to the task on the transaction, and highlight it so you don't have to search for it.

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].

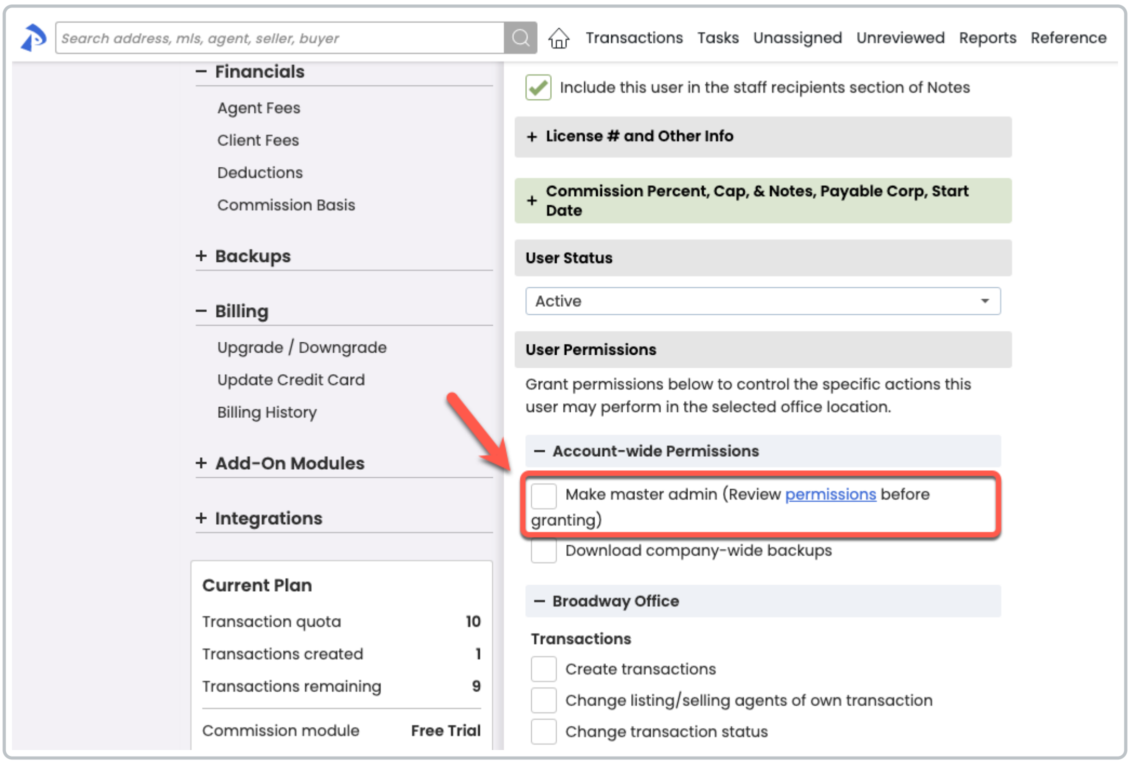



Save time by managing master admin access directly in Pipeline

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"




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

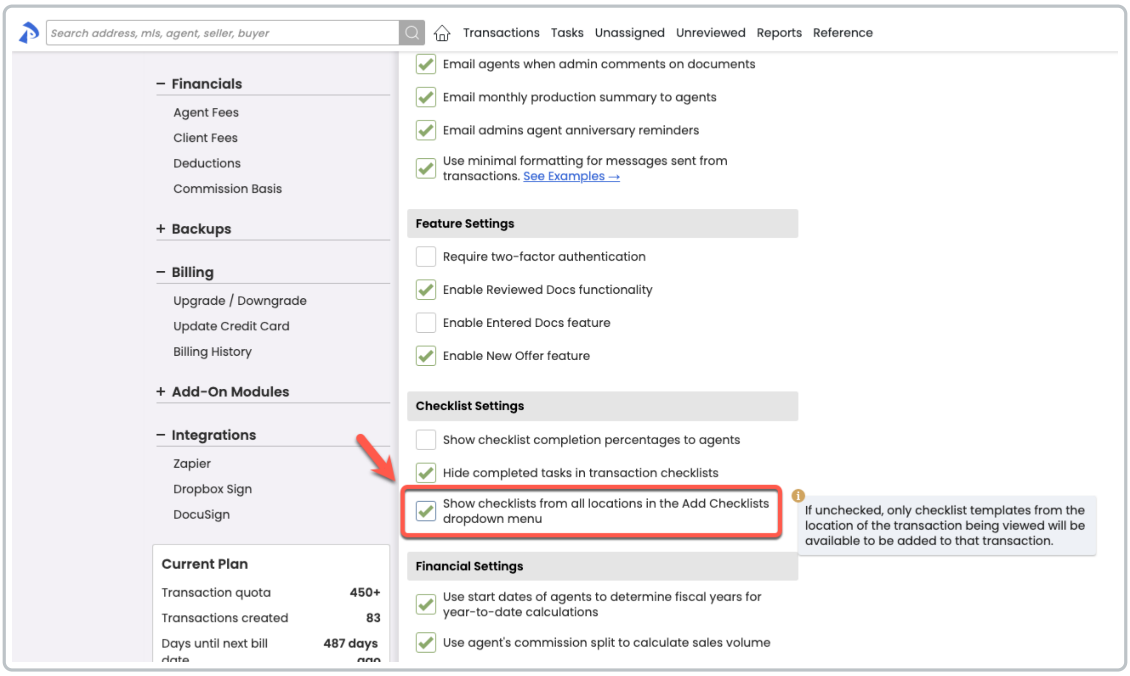
If your office has a need to only allow checklists that belong to a transcation's location to be added to that transaction, you can set your account accordingly.

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).

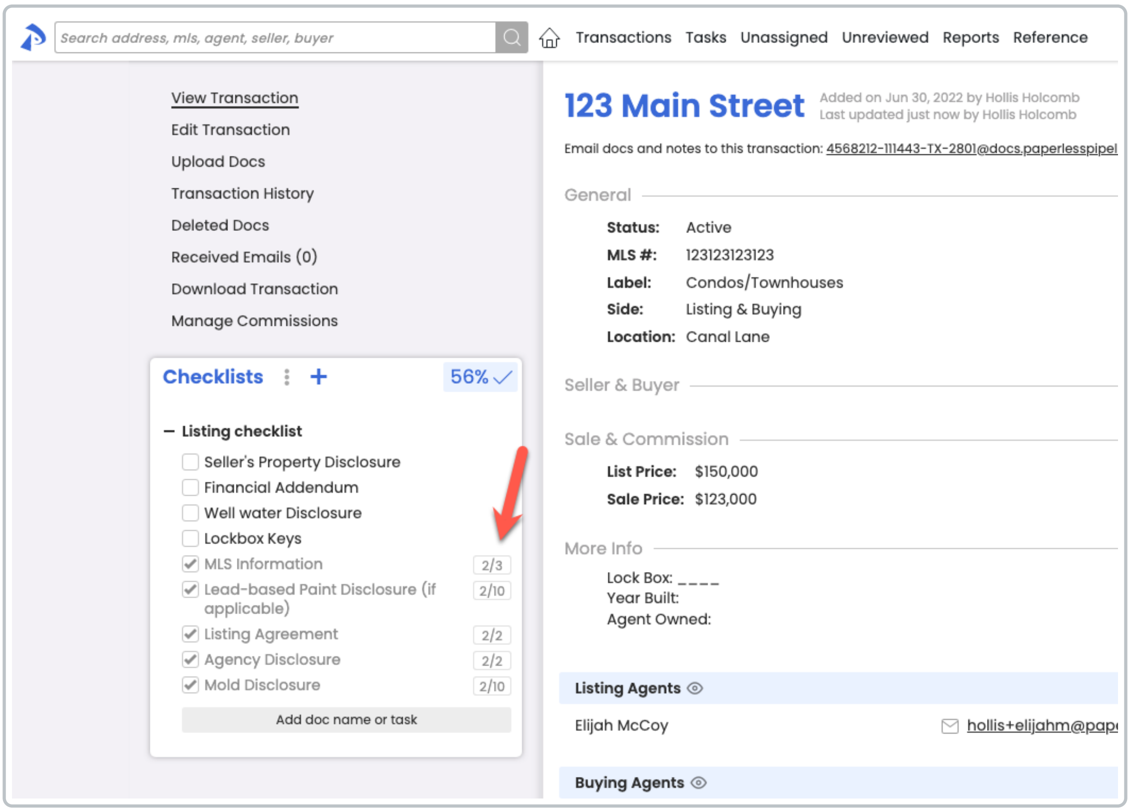
  By default, all checklists are add-able to all transactions, regardless of the checklists' location. If you need to restrict that to only allow checklists from the transaction's location to be added, from Company Settings, uncheck "Show checklists from all locations in the Add Checklists dropdown menu" 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

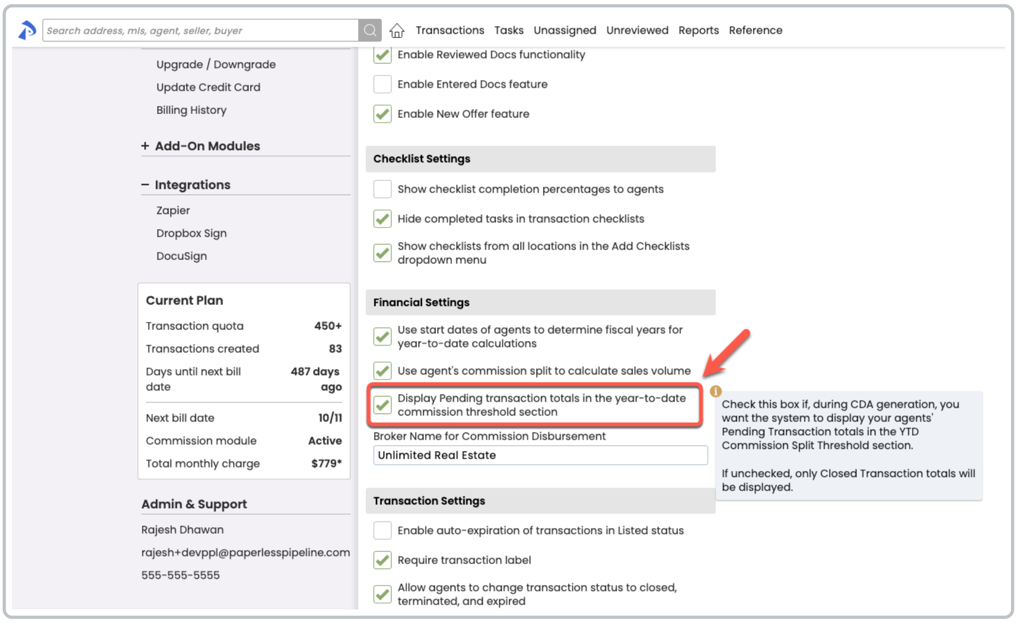
The due dates of tasks will now continue to be displayed even after they have been marked as complete, saving time from hovering.



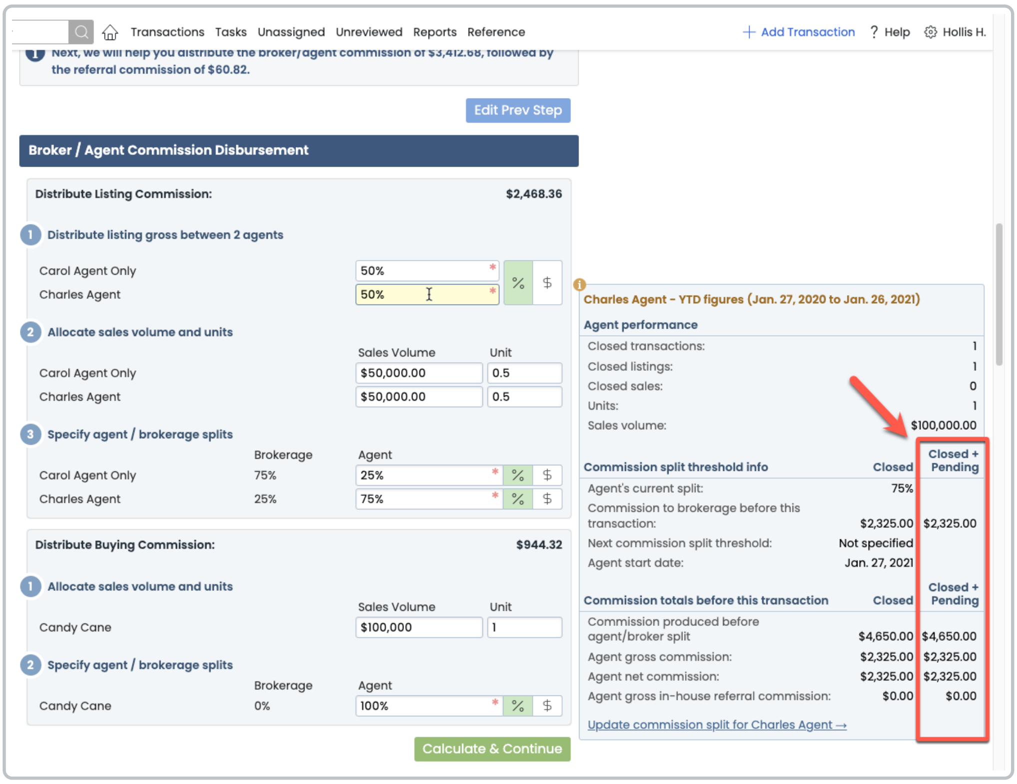

COMMISSION MODULE

**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.




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.




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