

# What's New (May 7, 2023)

Ensure contact info on transactions is clean and up-to-date

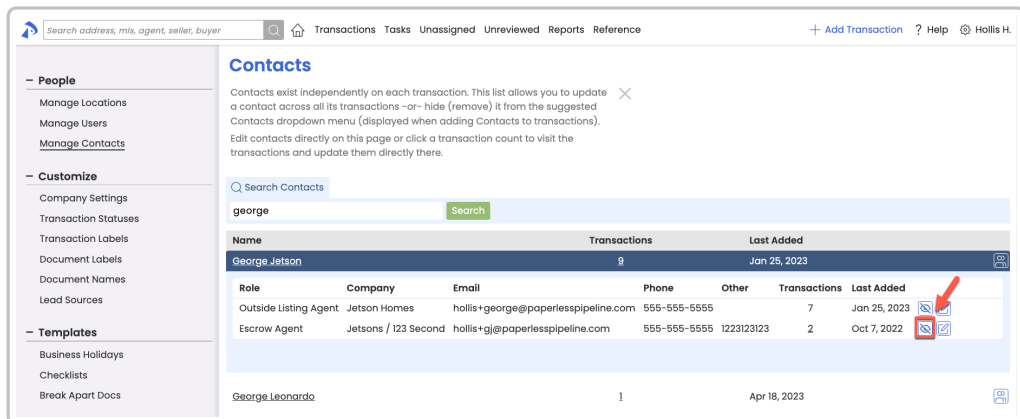
Adding contacts to transactions gives your team at-a-glance access to contacts' information, and allows for effortless [single-click messaging](#) and [contact sharing](#).

The new Contact Management tool helps you ensure those contacts are both seamless to add and error-free. Here's how:

- **Prevent inaccurate contacts from being recommended**

Make sure your team is adding the correct and most up-to-date information for contacts by ensuring the list they're pulling from is clean and updated.

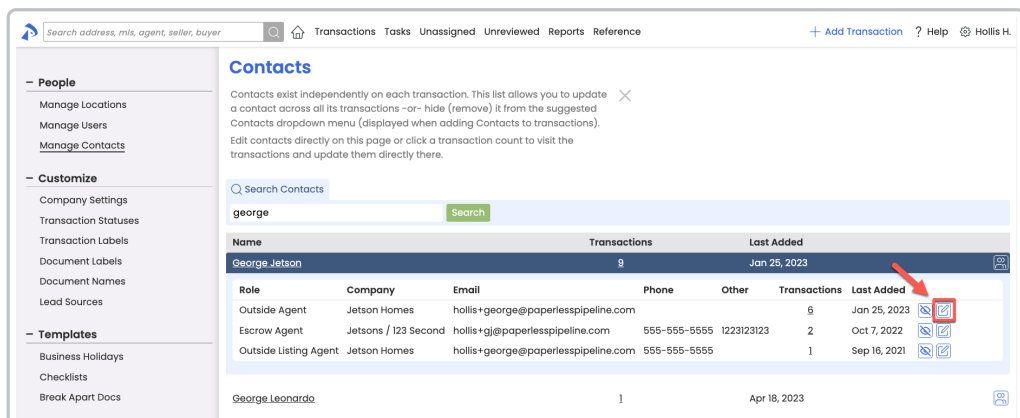
You can now hide contact information that has been added incorrectly in the past or that is outdated. Hiding inaccurate contacts will ensure those contacts are not recommended to your team when they're adding contacts to transactions in the future, leading to more error-free contacts on transactions.



- **Update incorrect contacts across transactions**

In cases where it's important for incorrect contact information to be updated on the transactions where that inaccurate contact information exists, you can now correct the error across all transactions at once.

[Learn more about Managing Contacts →](#)



Start updating with just a click

Just a friendly reminder (here and on hover of the Edit Transaction link) that you can get to the Edit Transaction page mouse-free by clicking **Ctrl+Shift+E** while viewing the transaction you'd like to edit.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

**0823 May Street** Added on May 8, 2023 by Hollis Holcomb  
Last updated 10 minutes ago by Hollis Holcomb

Email docs and notes to this transaction: [2308-269308-TX-5467773@docs.paperlesspipeline.com](mailto:2308-269308-TX-5467773@docs.paperlesspipeline.com)

**General**

**Status:** Pending  
**MLS #:** 08230823  
**Label:** Residential  
**Side:** Listing  
**Location:** Bluffington

**Seller & Buyer**

**Sale & Commission**

**Commission Summary:** • Escrow # -  
• Financing Type -  
• EM Amount -

**More Info** Ad

• Agent Service Plan -  
• Survey to Seller -

**Checklists** + 0% ✓

**Listing Tasks**

- ☐ Post Yard Sign @holcomb 5/1
- ☐ Send Intro Email to Seller @transaction manager 5/1
- ☐ Add Listing to MLS @agent 5/1
- ☐ Order Photography @agent 5/8
- ☐ Add Seller as Contact @agent 5/8

Instantly know when a date rule has been set

Task that have had a due date rule applied, but whose trigger date has not yet been entered, will now have a visual placeholder in place of the missing date. That placeholder will instantly let you know that a rule has been set, but not activated by its trigger date yet.

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• Survey to Seller -

**Checklists** + 17% ✓

**Listing Tasks**

- ☐ Order Photography 5/8
- ☐ Add Seller as Contact 5/8
- ☐ Add Listing to MLS -/-
- ☐ Add Home Photos to MLS -/-
- ☐ Add Home Tour Video to YouTube
- ☐ Send Intro Email to Seller