

What's New (September 10, 2023)

Get Signed DocuSign docs into Pipeline without lifting a finger

Docs you send for DocuSign signature from Pipeline will now be automatically imported back into Pipeline once they've been fully executed...no upload needed! Once docs are fully executed, they'll automatically arrive in Unassigned Docs where they can be assigned via the same easy workflow you're already used to. You'll continue to receive an email notification that signing has been completed, and you'll also now receive a notification on your [Pipeline Home page](#) whenever you log in.

[Learn more about Receiving Signed Docs Automatically via DocuSign](#) →

Unassigned Docs 36 docs.

Email docs to your Unassigned Docs page: 1238212-999443-x@docs.paperlesspipeline.com

Bulk Search docs... Search Sort Columns

<input type="checkbox"/>	Unassigned Doc Name	Email Subject or So...	Location
<input type="checkbox"/>	Please_DocuSign:_Agreement	Imported from DocuSign	Austin
<input type="checkbox"/>			
<input type="checkbox"/>			

Send Reference Docs from Transactions in one step

Save time and steps by sending *Reference* forms and docs directly from transactions. Start the process by visiting the Reference page, selecting the doc you'd like to send, then specifying from which transaction you'd like the doc to be sent. Docs sent in that manner will have that activity tracked in the Notes & Sent Emails section of the transaction, as well as the Transaction's history.

[Learn more about Sending Reference Docs & Links from a Transaction](#) →

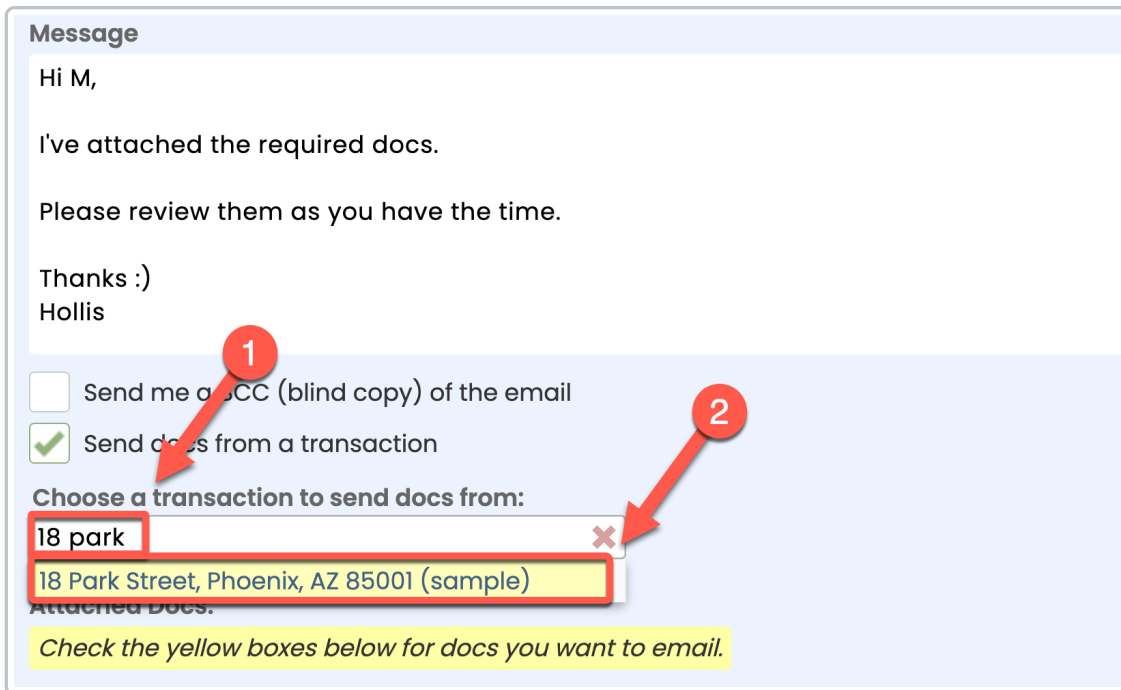
Search address, mls, agent, seller, buyer Transactions Tasks Unassigned **Reference**

Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

Search **Email Docs**

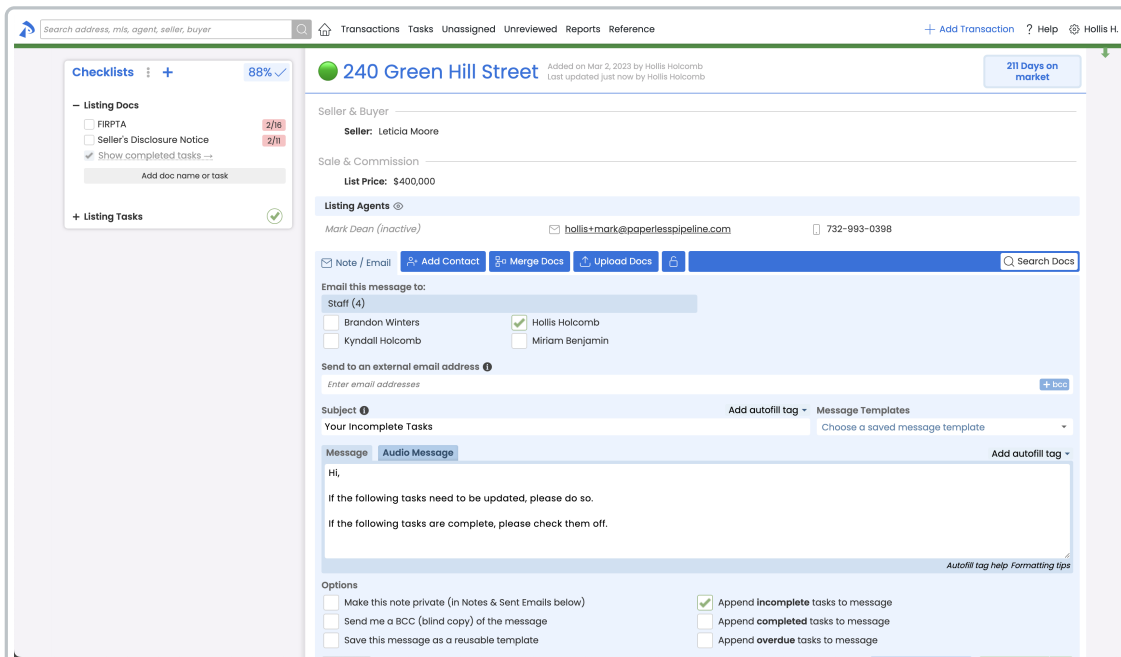
<input type="checkbox"/>	+ Awards & Recognition (2 docs)	Added By	Added On
<input type="checkbox"/>	+ Company Images (2 docs)	Added By	Added On
<input type="checkbox"/>	- Contract Forms (5 docs)	Added By	Added On
<input type="checkbox"/>	Listing Contract	Hollis H.	Aug 5, 2021

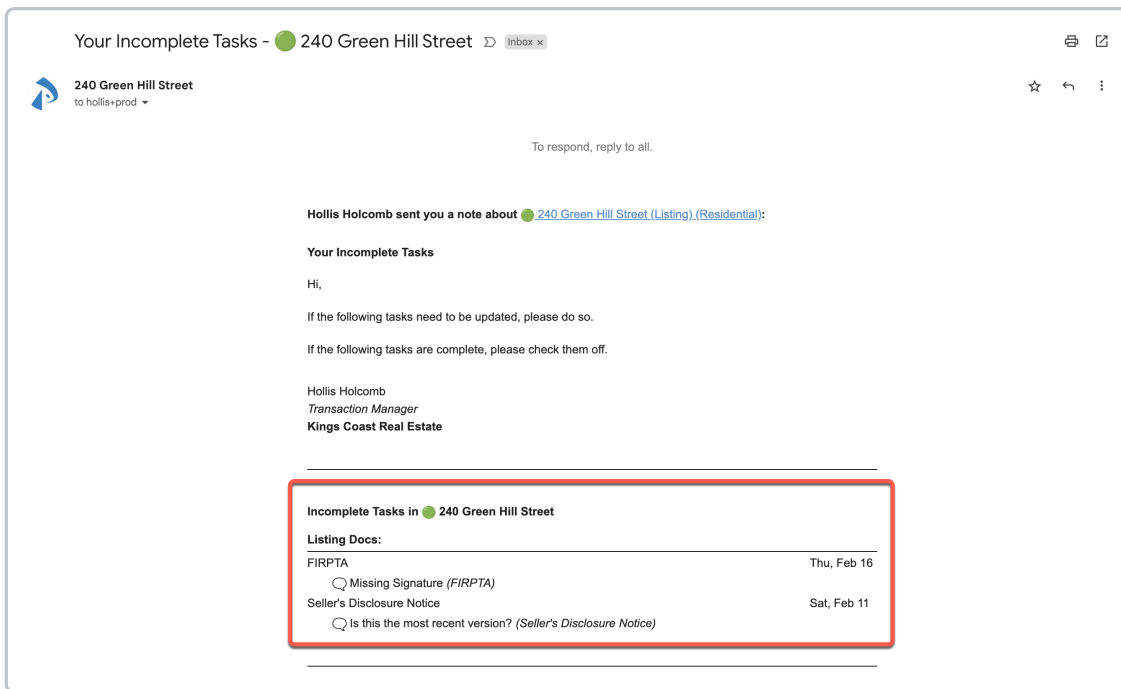


Automatically communicate important doc updates when sending task reminders

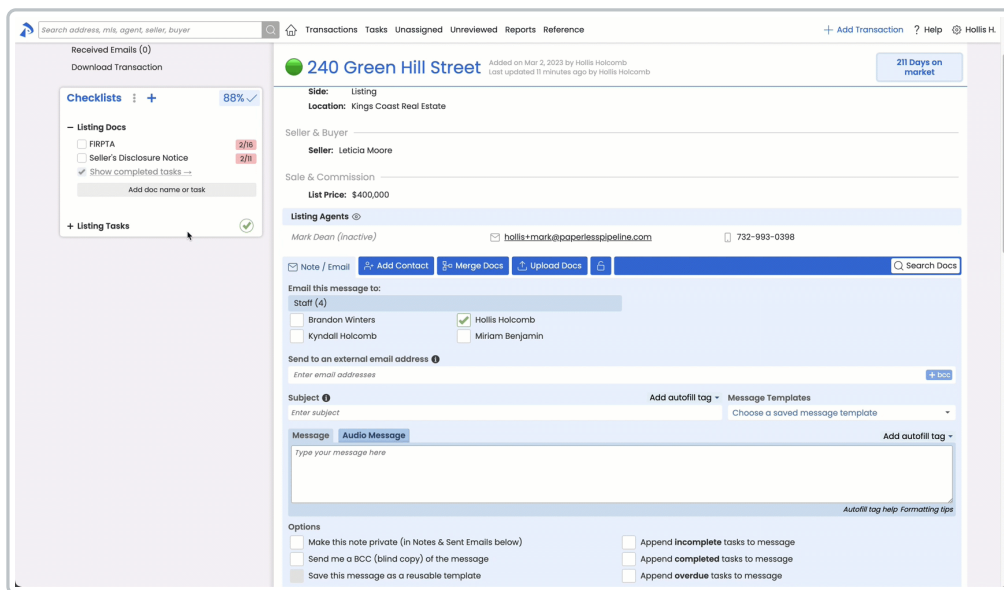
When a task is directly related to a doc, any comment made on that doc will automatically be included when the task is sent in a message. Whether dragging a task into the message field, appending tasks to a message, or a task is automatically included in a daily task reminder email, including the related doc comments will help your team conveniently identify the state of the doc.

Example 1: Append tasks to an email





Example 2: Drag Tasks to Message



Enter buyers and sellers in one place

Entering the buyer and seller information directly into the transaction input page will now automatically create a contact on the transaction, saving you the time of having to enter the person's information in both places.


To add a buyer or seller, from the Add or Edit Transaction page, click [add seller / buyer as contact], then enter their information (address, email, phone, etc.). When the transaction is saved, a new contact will automatically be created based on the information you entered.

[Learn more about Adding Buyers & Sellers →](#)

Transactions Tasks Unassigned Unreviewed Reports Reference

More Info

Admin Info (only visible to admin staff)

Include  240 Green Hill Street in September's backup

— Buyer, Seller, Pricing, etc. Hide

Seller Name * Seller Lead Source

[add seller as contact](#)

Seller Address Seller Email

Seller Phone Seller Fax / Other

Buyer Name Buyer Lead Source

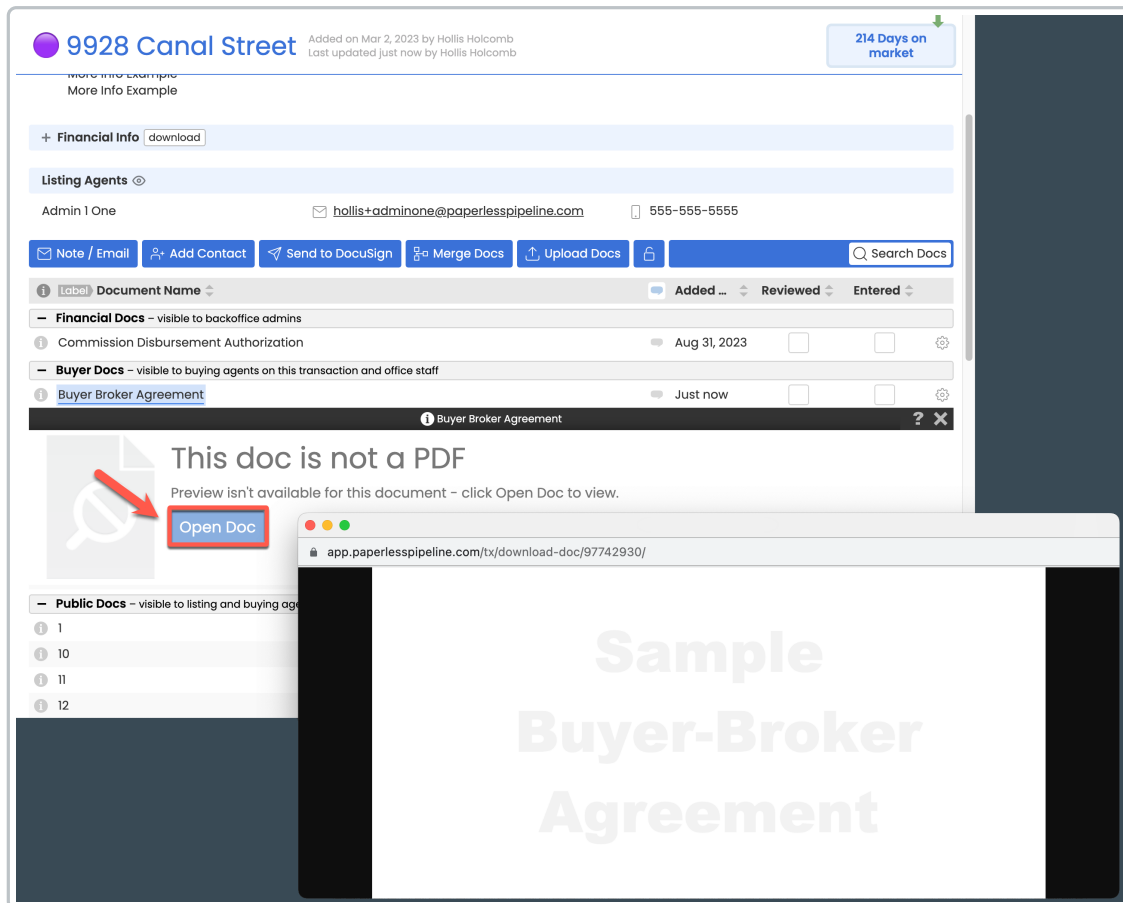
[add buyer as contact](#)

List Price

Sale Price

Save time by viewing images with a single click

If your office allows images to be uploaded to your account, you no longer have to download them to view them. To quickly view an image doc from any doc list, click the doc name, then [Open doc].



Final Commission Summary Notes are preserved to ensure accuracy

Once commissions have been managed and finalized on a transaction, the *Commission Summary* can no longer be edited by agents. This helps preserve the state of those notes at the time commissions were run to ensure their accuracy.

[Learn more about transaction fields that cannot be updated by agents →](#)

Assign accurate Financing Types

You asked for more *Financing Type* options and now they're yours.

The optional *Financing Type* field helps your team cleanly keep track of each deal's financing method. Master admins can visit [Company Settings](#) to turn the field on, if needed.

Total Commission
\$

Commission summary
Our Commission- __%

Agent Fees:
· Agent Fee 1-
· Agent Fee 2-
· Agent Fee 3-

Special Fees:
· Photography Fee
· Sign Fee
· TC Fee

Earnest Money Amount
\$

Financing Type
Select an Option

- Conventional
- Cash
- DPA
- FHA
- Jumbo Loan
- Owner Financing
- Private Party Loan
- USDA
- VA
- Waived Financing
- Other

Assigned Agents

Listing	Buying	Agent
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jim Smith
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Alice Parker



Notice that the old "FHA/VA" option has been split into two separate items. If you need to update any of your transactions from "FHA/VA" to one of the separated options, [click here](#) → then update as needed.

Easily track and access co-op agent phone numbers

You can now conveniently store co-op agents' phone numbers along with their other information on transactions. Add an agent's phone number while creating or editing transactions, and it will be viewable along with the agent's other info on transactions.

[Learn more about Adding Co-op Agents](#) →



This transaction has outside (co-op) agents

Outside Listing Agent

Name / Info:

Email:

Phone:

Outside Buying Agent

Name / Info:

Email:

Phone:

Definitively indicate when there is no Home Warranty OR that an agent is responsible

Two new *Home Warranty* options allow you to more accurately report home warranty responsibility.

- **None:** Select "None" to communicate that the field has been completed, but that a home warranty will not be included.
- **Agent:** Select "Agent" to indicate agent responsibility.

Other Information

Year Built

Lockbox Code

Transaction Coordinator

Sellers Disclosure Due

Custom Date Field

Compliance Deadline

Home Warranty

Paid by Seller

Paid by Buyer

Paid by Agent

None

Financing Status

Custom List Field

More Info

****MORE INFO FOR OREGON:****

EM Amount:
Home Warranty:
EM Received (Y/N):
Prelim Received (Y/N):

Note: Select the home warranty payer. Leave blank if no home warranty.