What's New (December 10, 2023)

**Duplicate Transaction: The Time-saving Tool You Didn't Know You Needed**

Say goodbye to repetitive manual transaction entries. Pipeline's new *Duplicate Transaction* option can streamline your team's workflow in unique and creative ways you won't be able to live without.

Here are a few examples of how duplicating transactions can save time every day:

- **Transactions as Templates**: Create a transaction to be used as a template, containing whatever default information is appropriate for that template's scenario (e.g., *Transaction Name*: "Sunset Office Listing Template", or "Team Willow - Template"). Include as much or as little info, docs, contacts, checklists, etc. as needed. Whenever that template transaction gets duplicated, its info will automatically be copied over. Then any remaining, transaction-specific information can be added to the resulting transaction.

- **Copy Buyer Offer Transaction:** Duplicate an existing buyer's offer transaction when it falls through to effortlessly copy the transaction.

- **Support a Parcel of Properties:** Save time by duplicating transactions representing a parcel of several properties with nearly identical property information.

To duplicate a transaction: From the Transaction List , click the transaction's gear, then select [Duplicate].

Learn how to Duplicate A Transaction →
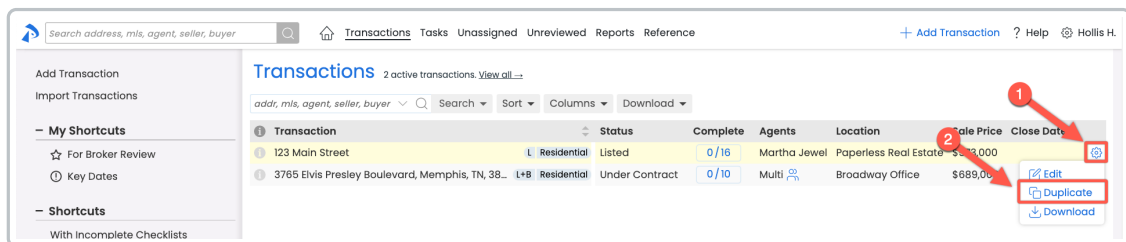
You should not duplicate transactions when Listing-side transactions fall through. Instead, you should create a New Offer to copy only the relevant Listing info and link the subsequent transaction with the original. Learn more →

Instantly Track a Transaction's Progress and Verify Activity

You can now quickly locate the exact actions that have occurred on a transaction, saving the time of having to browse potentially long transaction histories.

To find specific actions, click on [Transaction History] in the left menu of a transaction. Then, use the search filters at the top of the page. You can filter by the type of action, the user who performed it, and/or a date range.

Learn how to Search A Transaction's Activity History →

Save Time By Running Combined Searches in a Single Step

You can now access *Power Search* in the area where it has the most power, and save time in the meantime. *Power Search* has always been at your service in the upper left corner of each Pipeline page, with the resulting search criteria conveniently copied into Transactions – Advanced Search, where you can add additional search criteria, if desired.

But now your *Power Search* options can be accessed directly from Advanced Search, allowing you to *Power Search* and add any additional filters in a single step.
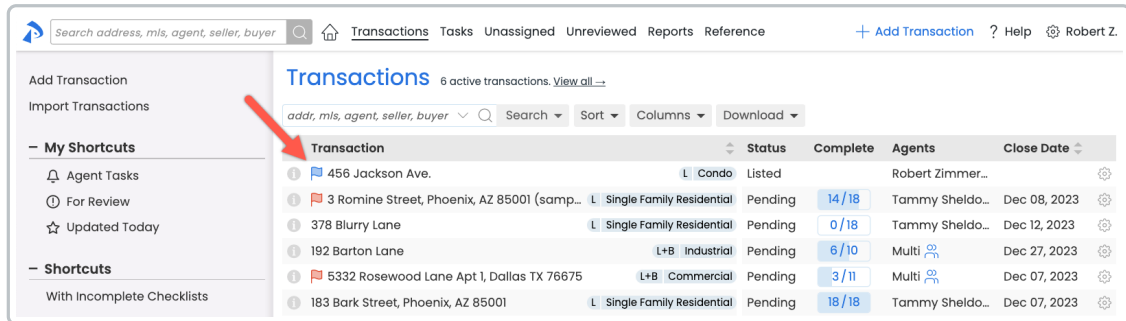
Learn more about Power Search →

Spot and Address Important Transactions Instantly with Custom Flags

Need to see which transactions were recently added? Which have recently received messages? Which are ready for a certain action? Avoid missing or overlooking transactions that are important to you by flagging them with your very own custom flags. *Transaction Flags* can be based on any search criteria that can be defined in the *Transaction Search* area.

To create a custom flag from the Transaction List , run you desired search, then click [Save Search], choose a flag, name it, and save it.

That's it! Transactions matching that criteria will be flagged for you on the *Transactions List* going forward.
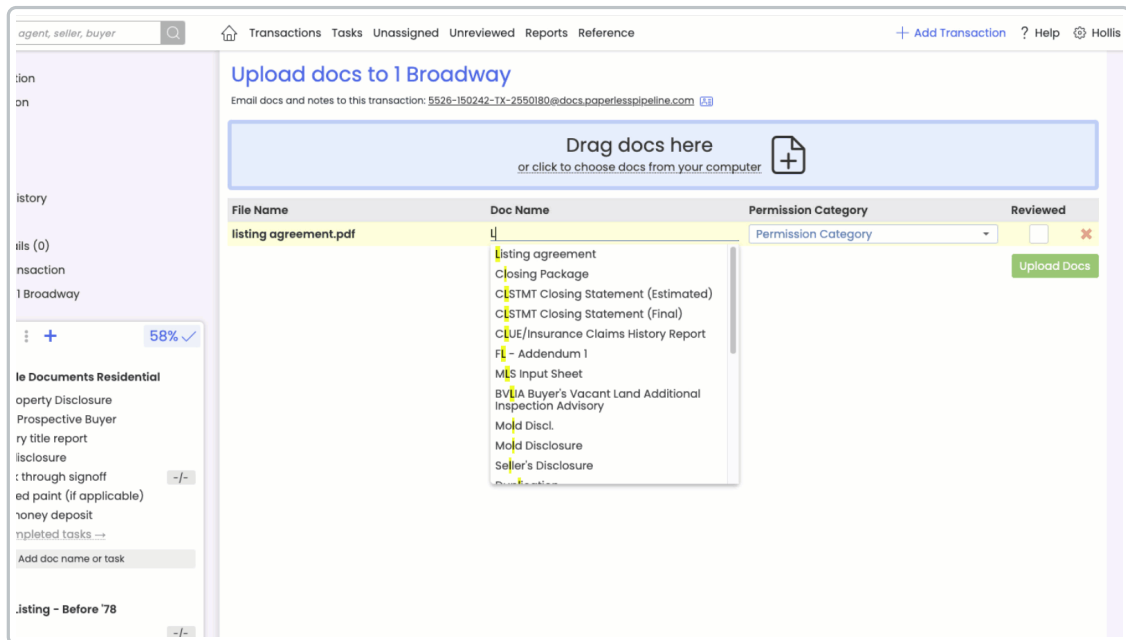
Automatic Doc Versioning Saves Your Team Typing

Pipeline will now allow docs with duplicate names to be added to transactions. Any duplicate doc name will have a version number appended to the end (e.g., Listing Agreement (2)).

This new automatic versioning of docs does not impact the *Company Setting; Prevent duplicate document uploads.* That setting is unrelated to this feature and controls whether a doc can be added when the actual contents of the doc (vs. the doc name) are identical to an existing doc . Learn more →

See a Transaction's Agents at a Glance

You can now view the agent associated with a transaction directly from the *Transactions List* without hovering. When there is more than one agent on a transaction, "Multi" will be displayed, and you can continue to hover to view those agents.

One-click Text Formatting: Make Important Parts of Your Messages Stand Out

Use standard formatting icons to format text within messages you send from Pipeline – no special markings/markdown needed. This new WYSIWYG (what you see is what you get) editor allows you to format your text with a single-click, and see what it looks like in real time.

Create visually appealing and engaging messages by adding headings, emphasizing important points with bold or italic text, turn text into links, inserting horizontal lines, and creating bulleted and numbered lists.

Learn how to Format A Message →
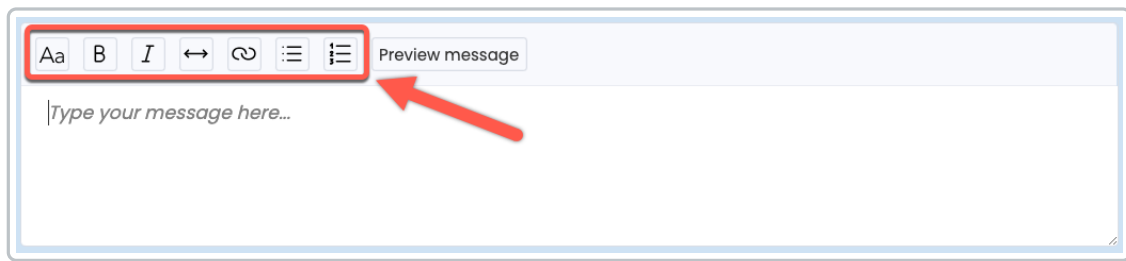
Personalize Your Emails with Agent Signatures (for Transaction Coordinators)

Transaction coordinators, you now have the super power of including the desired agent's signature in emails you send from Pipeline, providing recipients with a more personalized experience and appropriate contact information.

To start including agent signatures, turn on *Enable alternate signatures on my messages* from your Personal Profile .

Next, choose whose signature you want to include when creating a message on the transaction.

Learn how to Use Agent Signatures In Your Messages (for Transaction Coordinators) →

323 November Way, Orlando, FL 32805-1234

☑ Note / Email | ☖ Add Contact | ⬀ Send to DocuSign | ⬚ Merge Docs | ⬆ Upload Docs | 🔒 | 🔍 Search Docs

Email this message to:

☐ Listing agents	☐ Buying agents	Staff (9)	
☐ Elijah McCoy	☐ Herman Munster	☐ Hollis Holcomb	☐ Kyn Holco
		☐ Monta Test It Fleming	☐ Professor Plum (Agent)
		☐ Rachel McWhirter	☐ Rajesh Dhawan
		☐ Ramu Tremblay	☐ Release Person
		☐ Roger Klotz	

Send to an external email address ⓘ

| seller@paperlesspipeline.com | Enter email addresses | + bcc |

Subject ⓘ   Add autofill tag ▾   **Message Templates**

Your Timeline   Choose a saved message template ▾

Message | **Audio Message**   Add autofill tag ▾

Aa | B | I | ↔ | 🔗 | ☰ | ☷ | Preview message

Your Timeline for {{transaction name}}

{{key dates}}

Autofill tag help · Formatting tips

Options

☐ Make this note private (in Notes & Sent Emails below)   ☐ Append **incomplete** tasks to message

☐ Send me a BCC (blind copy) of the message   ☐ Append **completed** tasks to message

☐ Save this message as a reusable template   ☐ Append **overdue** tasks to message

Include my signature ▲
Include my signature ✔
Include Listing agent signature
Include Buying agent signature
No signature

Send Email ▾