

What's New (December 10, 2023)

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

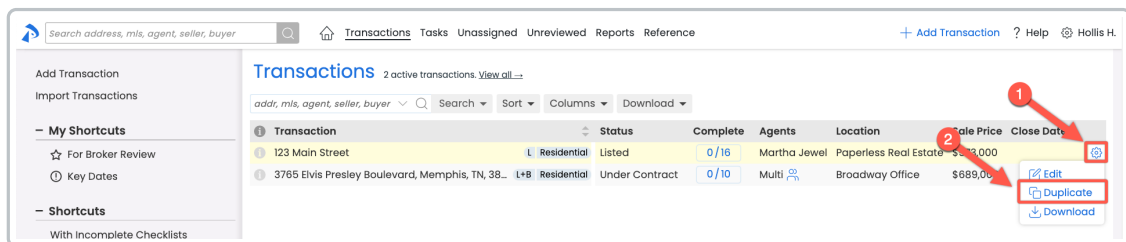
Say goodbye to repetitive manual transaction entries. Pipeline's new *Duplicate Transaction* option can streamline your team's workflow in unique and creative ways you won't be able to live without.

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 →](#)

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help Hollis H.

View Transaction
Edit Transaction
Upload Docs
Assign Docs
Transaction History
Received Emails (0)
Download Transaction
Manage Commissions
← Go back to 1234 Bungee Lane

Checklists + 0%✓
— Listing checklist (Residential)

Activity History for 1234 Bungee Lane

25 transaction activities

Email docs and notes to this transaction: 4568212-111443-TX-28163@docs.paperlesspipeline.com

search Search

Type Select action type(s) User Select a User Date Range start date end date Search

Type	Description	Action	Updated By	Updated On
Listing checklist (Residential)		Added	Hollis H.	Dec 8th
Rental Listing		Deleted	Hollis H.	Dec 8th
listing agreement		Reviewed	Hollis H.	Dec 8th
Listing Date added: 2023-12-08		Added	Hollis H.	Dec 8th
Status changed to: Listed (was: Active (...))		Updated	Hollis H.	Dec 8th
Seller Name added: Jim Crouch		Added	Hollis H.	Dec 8th

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 →](#)

agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help Hollis

1-50 of 170 active transactions. [View all →](#)

add, mls, agent, seller, buyer Search Sort Columns Download First Prev Next Last

Status Any Status → Search by Date Range... Choose a Date Type → Side Any Side → Location Any Location →

Label Any Label → Commissions Commissions → Checklist Status Any Checklist → Search

Transaction	Status	Complete	Agents	Location	Sale Price	Close Date
678 Peppermill Lane	Commercial	Listed	0 / 101	Kristian Admin	Atlantic office 2	\$610,720
icon font test 110323	Commercial	Listed	0 / 16		Atlantic office 2	
1030 Post Release Drive	Residential	Listed	3 / 30	Multi	Atlantic office 2	
New Line?	Office	Listed	0 / 19		Atlantic office 2	
124 Pipermill Rd	Commercial	Listed	0 / 101	Kristian Admin	Atlantic office 2	\$610,720
1234 Burgess Lane	New Construction	Listed	0 / 101	Agent Red	Atlantic office 2	
12345 Purser Lane	Lease	Listed	0 / 14		Atlantic office 2	
12345 Numeric Lane	New Construction	Listed	0 / 14	Multi	Balfour Way2	
12345 Numeric Lane	New Construction	Listed	1 / 18	Bradley's Team		
12345 Numeric Lane	New Construction	Listed	4 / 18	Bradley's Team		Jun 15, 2023
12345 Numeric Lane	New Construction	Listed	0 / 14	Bradley's Team		
12345 Numeric Lane	New Construction	Listed	0 / 14	Bradley's Team		
12345 Numeric Lane	New Construction	Listed	0 / 14	Bradley's Team		
123 Main Street (#2) - h...	Commercial	Listed	2 / 21	Multi	Bradley's Team	the sale price is \$60,0...
Bob Smith Referral	Rental	Listed	1 / 13	Multi	Broadway and 11th off...	\$750 Feb 08, 2022
Copy2 of 1501 S 7th St, Br...	Zapier	Listed	0 / 51	Multi	Old Pine	\$100,000

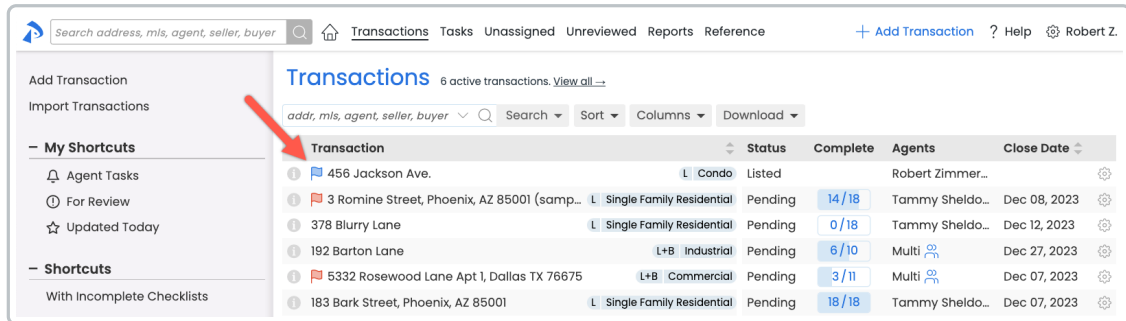
Spot and Address Important Transactions Instantly with Custom Flags

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 your 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.

[Learn more about Transaction Flags →](#)

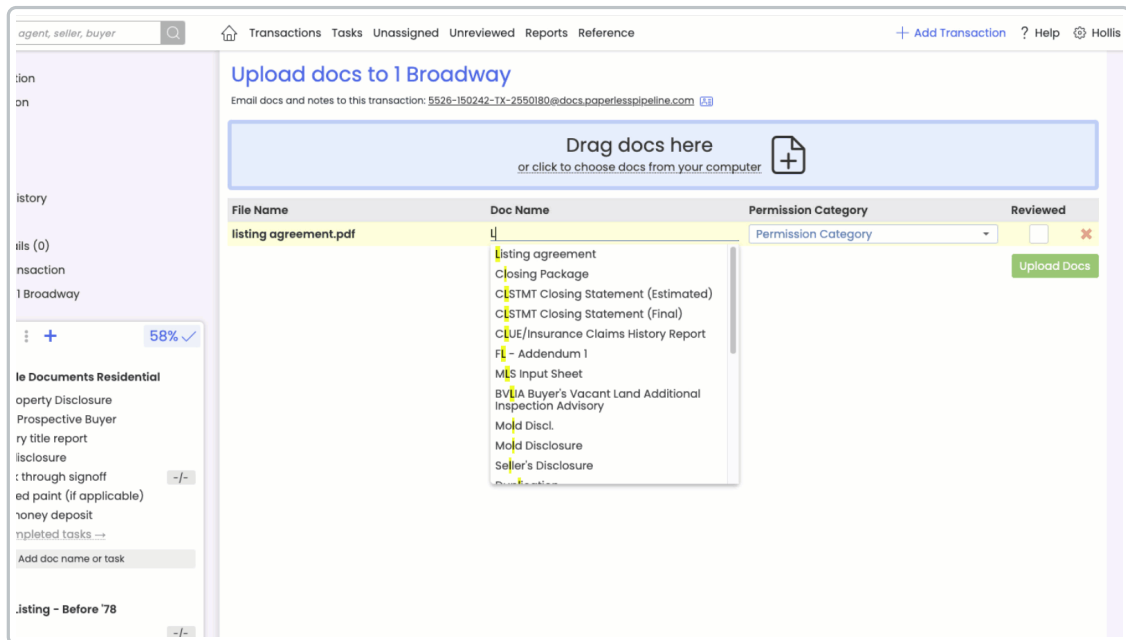


The screenshot shows the 'Transactions' page in Pipeline. The left sidebar contains 'Add Transaction', 'Import Transactions', 'My Shortcuts', and 'Shortcuts'. The main area displays a table of transactions. A red arrow points to the 'Transaction' column header.

Transaction	Status	Complete	Agents	Close Date
456 Jackson Ave.	L Condo Listed		Robert Zimmer...	
3 Romine Street, Phoenix, AZ 85001 (samp...	L Single Family Residential Pending	14/18	Tammy Sheldo...	Dec 08, 2023
378 Blurry Lane	L Single Family Residential Pending	0/18	Tammy Sheldo...	Dec 12, 2023
192 Barton Lane	L+B Industrial Pending	6/10	Multi	Dec 27, 2023
5332 Rosewood Lane Apt 1, Dallas TX 76675	L+B Commercial Pending	3/11	Multi	Dec 07, 2023
183 Bark Street, Phoenix, AZ 85001	L Single Family Residential Pending	18/18	Tammy Sheldo...	Dec 07, 2023

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)).



The screenshot shows the 'Upload docs to 1 Broadway' interface. It includes a search bar, a list of documents, and a table with columns: File Name, Doc Name, Permission Category, and Reviewed. A dropdown menu is open for the 'Doc Name' column, showing a list of document names with version numbers in parentheses.

File Name	Doc Name	Permission Category	Reviewed
listing agreement.pdf	listing agreement (1)	Permission Category	<input type="checkbox"/>

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.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

Transactions 1-50 of 52 active transactions. View all...

addr, mls, agent, seller, buyer Search Sort Columns Download

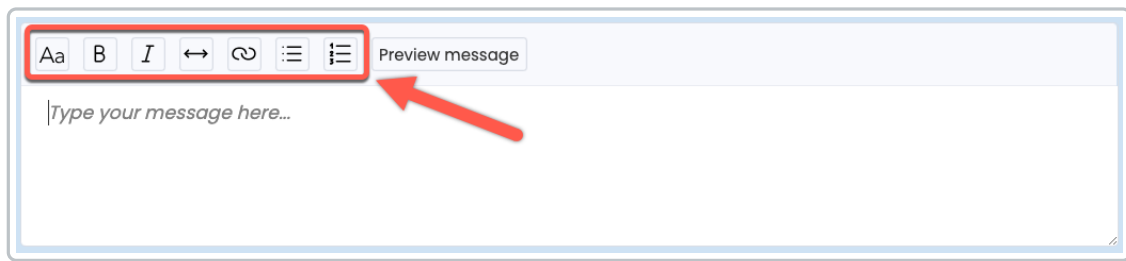
Transaction	Status	Complete	Agents	Location	Sale Price	Close Date
5332 Rosewood Lane, Dallas TX 76...	Residential Listed	4 / 116	Bobby Summers	Bluffington		
937 East Newcastle Avenue	Residential Listed	20 / 42	Multi	Kings Coast Real Estat...	\$250,000	
8675309 Jenny Ave	Residential Pending	0 / 34	Miriam Bernhard	Bluffington	\$150,000	
678 Miller Ave	Residential Pending	15 / 58	Ashley Winters	Bluffington	\$564,000	May 11, 2023
245 Second Street	Import Pending	8 / 24	Ashley Winters	Bluffington	\$100,000	Apr 26, 2023

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 \(for Transaction Coordinators\) →](#)

Note / Email Add Contact Send to DocuSign Merge Docs Upload Docs Search Docs

Email this message to:

<input type="checkbox"/> Listing agents	<input type="checkbox"/> Buying agents	Staff (9)	
<input type="checkbox"/> Elijah McCoy	<input type="checkbox"/> Herman Munster	<input type="checkbox"/> Hollis Holcomb	<input type="checkbox"/> Kyn Holco
		<input type="checkbox"/> Monta Test It Fleming	<input type="checkbox"/> Professor Plum (Agent)
		<input type="checkbox"/> Rachel McWhirter	<input type="checkbox"/> Rajesh Dhawan
		<input type="checkbox"/> Ramu Tremblay	<input type="checkbox"/> Release Person
		<input type="checkbox"/> 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

- | | |
|--------------------------------------------------------------------------------|--------------------------------------------------------------------|
| <input type="checkbox"/> Make this note private (in Notes & Sent Emails below) | <input type="checkbox"/> Append incomplete tasks to message |
| <input type="checkbox"/> Send me a BCC (blind copy) of the message | <input type="checkbox"/> Append completed tasks to message |
| <input type="checkbox"/> Save this message as a reusable template | <input type="checkbox"/> Append overdue tasks to message |

Include my signature

Include my signature ✓

Include Listing agent signature

Include Buying agent signature

No signature

Send Email