What's New (October 9, 2022)

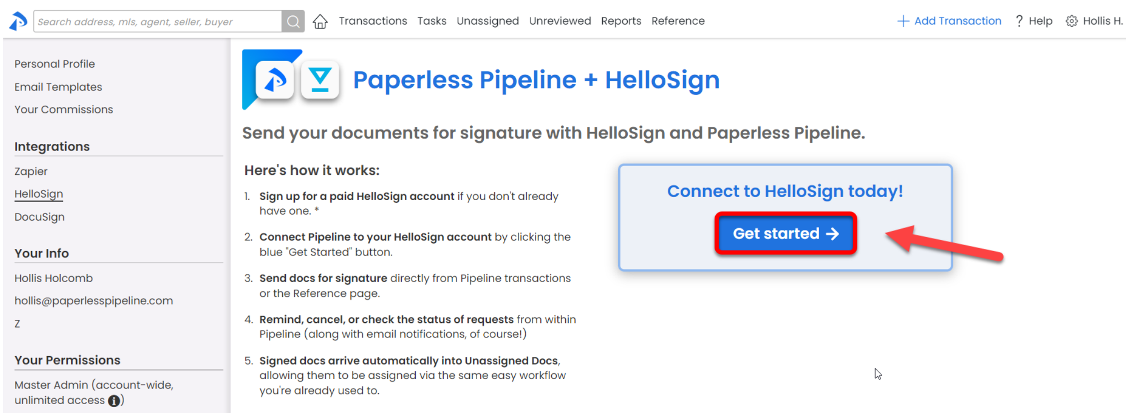
Fully integrated document signing is here!

Pipeline is now integrated with HelloSign providing you a smooth, simple process for requesting signatures directly from Pipeline transactions and the *Reference* page. Once your Pipeline account is connected to your paid HelloSign account, you'll see options to send docs for signature, send reminders, cancel, and check the status of any requests you've sent from Pipeline. 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.

Watch a 1-minute video about how it works →

Sign up / learn more about Paperless Pipeline & HelloSign →

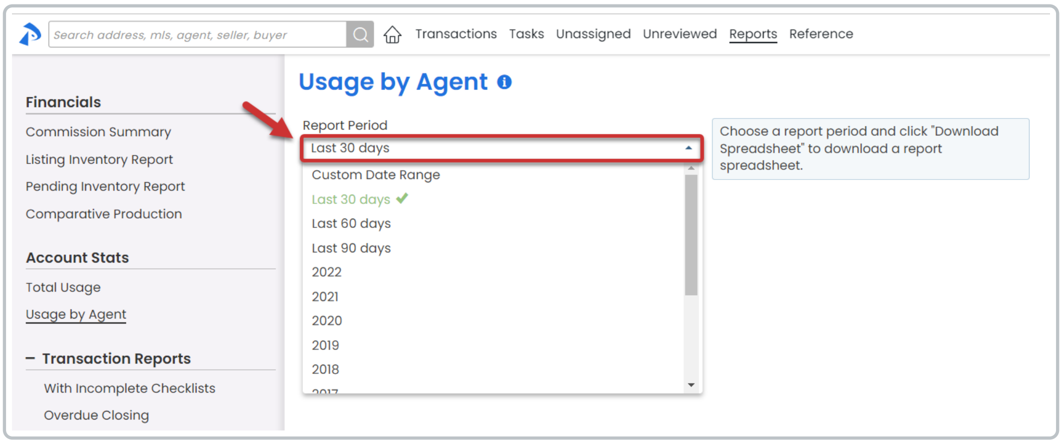
View full Paperless Pipeline & HelloSign help article here →



Get a quick count of agents' closed transactions

The *Usage by Agent* report now includes a column for *Transactions Closed*, allowing you to quickly view the number of transactions closed for each agent during your specified report period. For offices subscribed to the Commission Module, this report does not consider whether commissions have been entered.

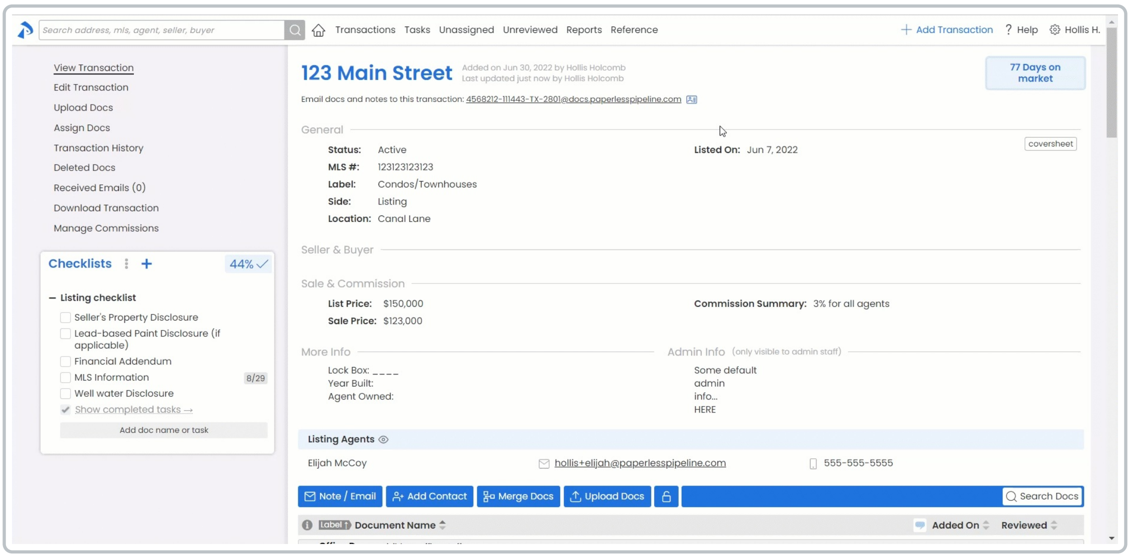
Learn more about the Usage by Agent Report →



Save time by bulk-changing the permission category of mis-categorized docs

Docs get assigned to the wrong *Permission Category*? Change them to the correct *Permission Category* all at once. Click the ☒ at the top of the documents section of transactions to start the process for any docs on that transaction.

Learn more about Bulk Changing Permission Category here →



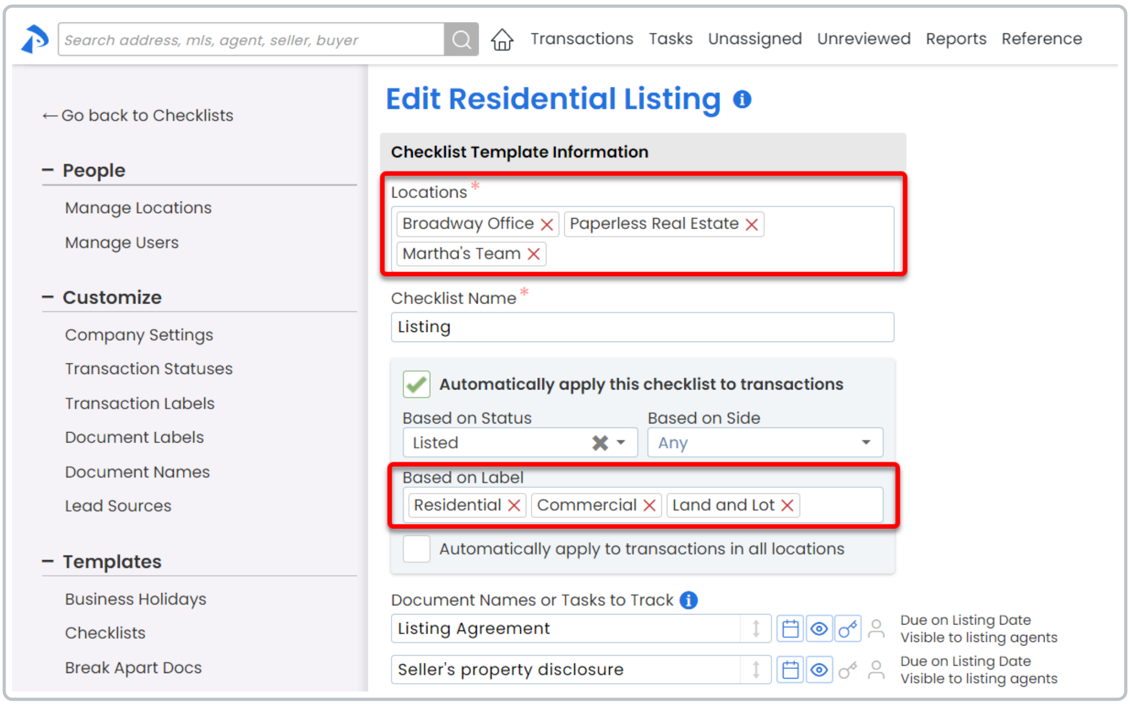
Relate a single checklist to multiple Locations and Transaction Labels

Instead of relating a checklist to either **one** or **all** *Locations* and *Transaction Labels*, you can now relate a single checklist to **multiple** *Locations* and **multiple** *Labels*. This new option:

- Allows you to set a single checklists to be automatically added to transactions in multiple *Locations* and with multiple *Labels*
- Allows you to give checklist-related permissions to a single checklist for admins in different *Locations*
- Helps organize and streamline your checklist setup (since you no longer need multiple checklists to represent multiple *Locations* and *Labels*).

If you previously created multiple checklists to represent multiple *Locations* or multiple *Labels* and would like to combine those into single checklists, learn how here →.

Learn more about Managing Checklists here →


Search address, mls, agent, seller, buyer
Transactions
Tasks
Unassigned
Unreviewed
Reports
Reference
←Go back to Checklists
People
Manage Locations
Manage Users
Customize
Company Settings
Transaction Statuses
Transaction Labels
Document Labels
Document Names
Lead Sources
Templates
Business Holidays
Checklists
Break Apart Docs
Edit Residential Listing
Checklist Template Information
Locations *
Broadway Office
Paperless Real Estate
Martha's Team
Checklist Name *
Listing
Automatically apply this checklist to transactions
Based on Status
Listed
Based on Side
Any
Based on Label
Residential
Commercial
Land and Lot
Automatically apply to transactions in all locations
Document Names or Tasks to Track
Listing Agreement
Due on Listing Date
Visible to listing agents
Seller's property disclosure
Due on Listing Date
Visible to listing agents