What's New (October 20, 2024)

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Save Time on New Offers by Not Having to Remove Buyer Side Contacts

When initiating a New Offer on a transaction, any buyer-side contacts will no longer be carried over automatically. This means you can now enter fresh buyer contacts on New Offers without the hassle of manually removing old ones.

Buyer-side contacts are defined as those containing any of the following words:

- “Buyer”
- “Lender”
- “Lending”
- “Escrow”
- “Title

Heads up that we’ll be adding more buyer side offer options in the very near future.

See New Offers.

Instantly View Timestamps for Notes & Sent Emails—No Hover Needed

Need to know exactly when messages were received or other actions took place on a transaction without having to hover over the date. You can now set the times that actions took place to be automatically visible—no hover needed.

To turn on visible timestamps, scroll down to the Notes & Sent Emails section on any transaction, click the Settings dots [⋮], then [Show timestamps]. The system will remember your selection and show (or hide) the timestamps on every transaction.

See Notes & Sent Emails.

Name Your Docs Even Faster!

When naming docs in Pipeline, the dropdown list of your office’s Standard Doc Names just got smarter. If your Standard Doc Names have been set up with pre-set Permission Categories, the system can prioritize showing the appropriate doc names when naming docs.

To display the list of docs that match a specific Permission Category, simply select the Permission Category FIRST (before typing the doc name). Then, when you begin typing the doc name, docs matching your selected Permission Category will appear in a section at the top of the doc name list.

See Standardized Document Names.

Fully Manipulate Your PDF Docs in One Place with Ease

Need to break apart a doc, rearrange its pages, or rotate some or all of the pages? We've got you covered! The Break Apart/Arrange feature now allows you to do all of the above!

To start using the features, go to the same Break Apart page for any transaction doc or unassigned doc like you always have (by clicking the doc's gear icon, then Break Apart). Then:

- To break apart: No changes—you can still click the scissors in between pages to break the doc apart.
- To rotate a page: hover over the page and click the [↻] icon.
- To rearrange: Click and drag a page to its desired new position.

While the system can manage rearranged pages after you start breaking apart and naming docs, we recommend rearranging the pages before you begin the break-apart process. This helps keep your workflow organized, making it easier to navigate through the process without confusion.

See Doc Break Apart.