

What's New (December 10, 2023)

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

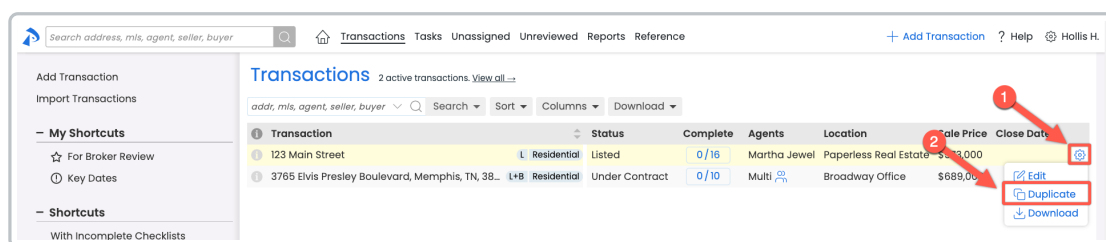
Say goodbye to repetitive manual transaction entries. Pipeline's new *Duplicate Transaction* option can streamline your team's workflow in unique and creative ways you won't be able to live without.

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 →](#)

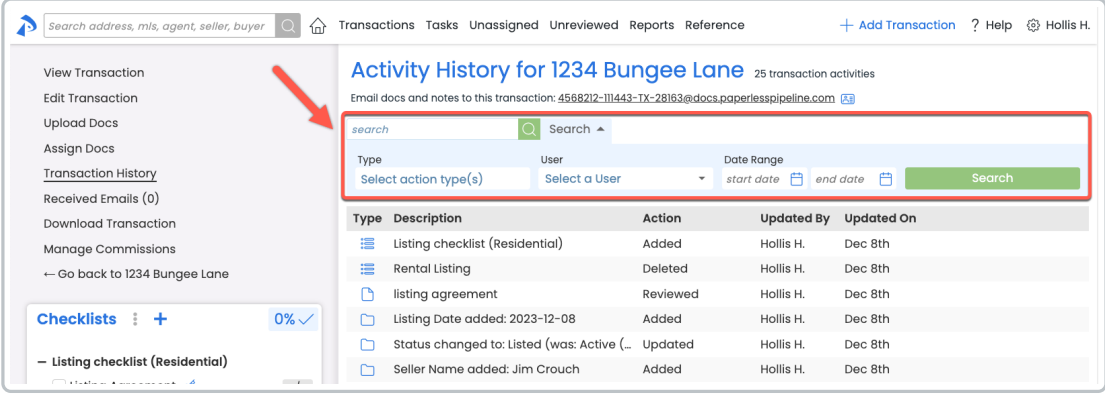
Instantly Track a Transaction's Progress and Verify Activity

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: 4588212-111443-TX-28163@docs.paperlesspipeline.com

search Search

Type User Date Range
Select action type(s) Select a User 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
Transactions 1-50 of 170 active transactions. View all									
addr, mls, agent, seller, buyer Search Sort Columns Download									
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...	Feb 05, 2022		
Bob Smith Referral	Rental	Listed	1/13	Multi	Broadway and 11th offi...	\$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.

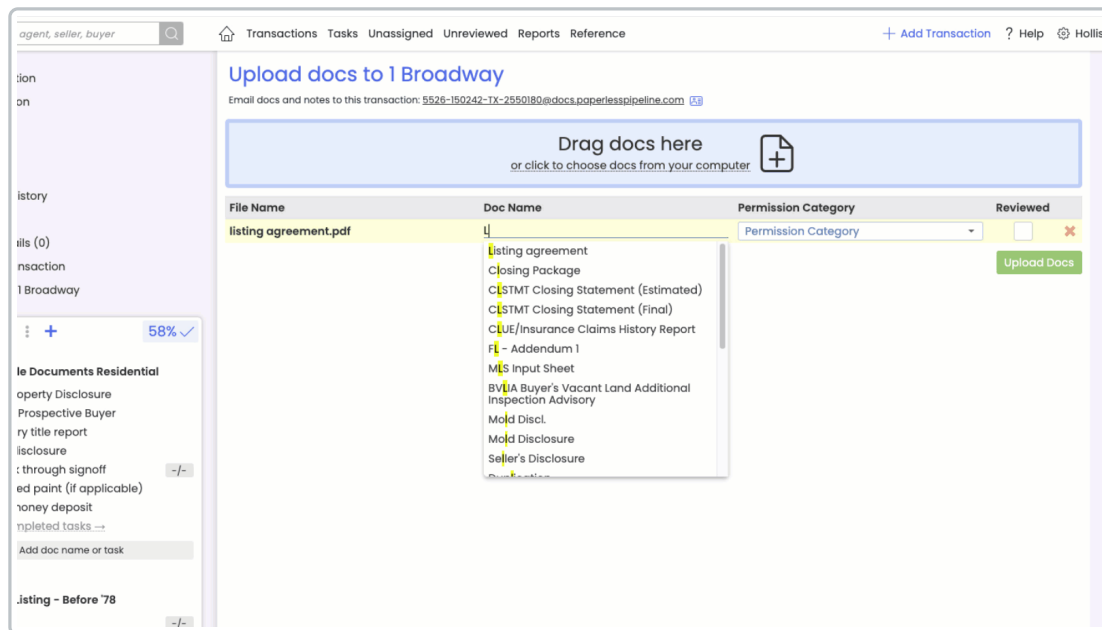
That's it! Transactions matching that criteria will be flagged for you on the *Transactions List* going forward.

[Learn more about Transaction Flags →](#)

Search address, mls, agent, seller, buyer	Transactions	Tasks	Unassigned	Unreviewed	Reports	Reference	+ Add Transaction	? Help	Robert Z.
Transactions 6 active transactions. View all									
addr, mls, agent, seller, buyer Search Sort Columns Download									
Transaction	Status	Complete	Agents	Close Date					
456 Jackson Ave.	Condo	Listed		Robert Zimmer...					
3 Romine Street, Phoenix, AZ 85001 (samp...	Single Family Residential	Pending	14/18	Tammy Sheldo...	Dec 08, 2023				
378 Blurry Lane	Single Family Residential	Pending	0/18	Tammy Sheldo...	Dec 12, 2023				
192 Barton Lane	Industrial	Pending	6/10	Multi	Dec 27, 2023				
5332 Rosewood Lane Apt 1, Dallas TX 76675	Commercial	Pending	3/11	Multi	Dec 07, 2023				
183 Bark Street, Phoenix, AZ 85001	Single Family Residential	Pending	18/18	Tammy Sheldo...	Dec 07, 2023				

Automatic Doc Versioning Saves Your Team Typing

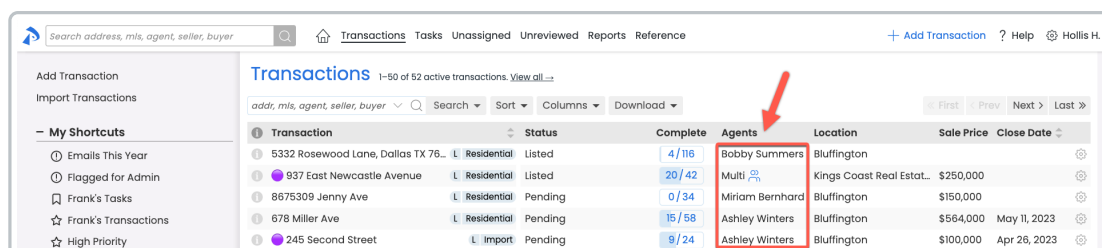
Pipeline will now allow docs with duplicate names to be added to transactions. Any duplicate doc name will have a version number appended to the end (e.g., Listing Agreement (2)).



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.



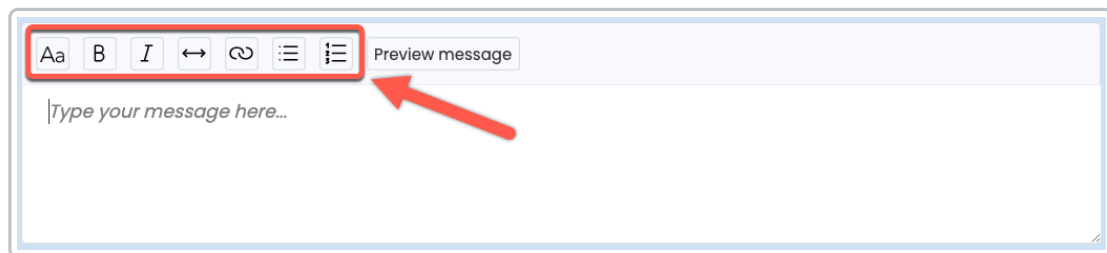
One-click Text Formatting: Make Important Parts of Your Messages Stand Out

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

☒ Note / Email

Email this message to:

☐ Listing agents

☐ Buying agents

☐ Elijah McCoy

☐ Herman Munster

Staff (9)

☐ Hollis Holcomb

☐ Monta Test It Fleming

☐ Rachel McWhirter

☐ Ramu Tremblay

☐ Roger Klotz

☐ Kyn Holco

☐ Professor Plum (Agent)

☐ Rajesh Dhawan

☐ Release Person

Send to an external email address ⓘ

 Enter email addresses

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)

☐ Send me a BCC (blind copy) of the message

☐ Save this message as a reusable template

☐ Append **incomplete** tasks to message

☐ Append **completed** tasks to message

☐ Append **overdue** tasks to message

Include my signature ▾

Include my signature ✓

Include Listing agent signature

Include Buying agent signature

No signature

Send Email ▾