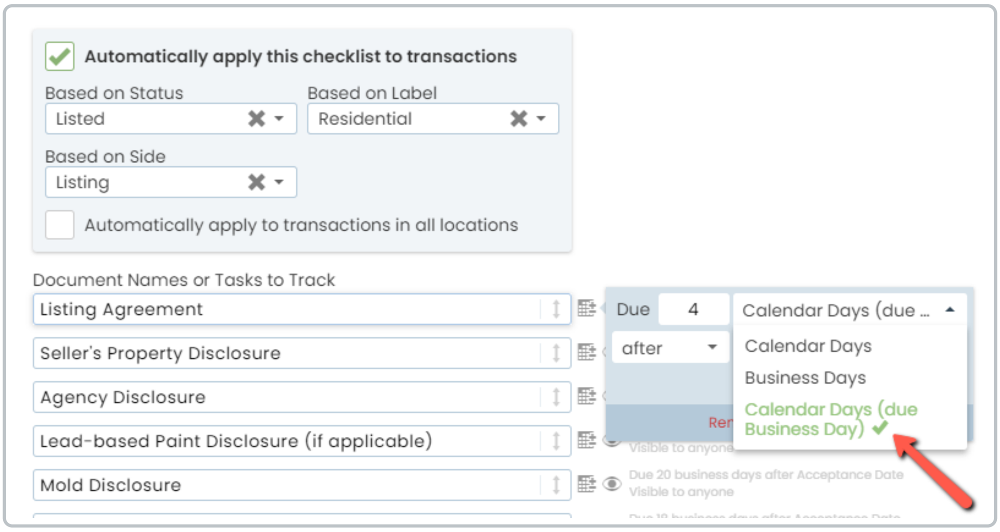
What's New (August 29, 2021)

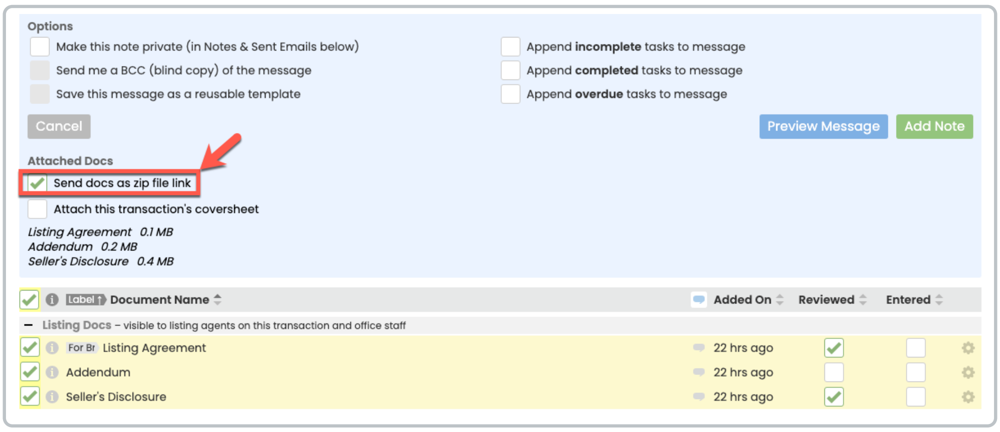
Fresh, new look: Pipeline has gotten a facelift! You'll still see all the features you know and love in their same places, but with updated styling, coloring and other modern enhancements. Take a look around to check out all the new feels.

Bump "Calendar Day" due date calculations to the next business day: In addition to automatically calculating task due dates based on calendar days or business days, you can now calculate due dates by calendar days, but bump the due date to the next business day if it falls on a weekend. Select "Calendar Days (due business day)" for any tasks that need that calculation.



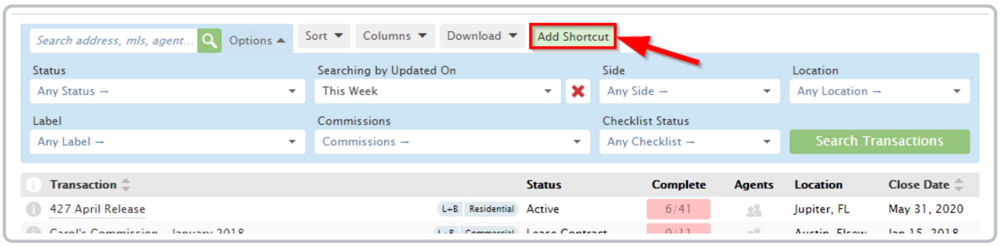
[Learn more about Due Date Calculations here →]()

Send closing package docs or other transaction docs as a single zip file: When sending docs from a transaction, you can now send them as a link to a single zip file. When drafting your message, add yourself or others as a recipient, select the docs you'd like to send, then check "Send docs as a zip file link" before sending. The email will contain a link to the resulting zip file which can be forwarded to share or clicked to download and store.



Learn more about Sending Docs as a Zip File here →

Save up to 8 Transaction List shortcuts: The limit on how many time-saving Transaction List shortcuts you can save has been increased from 5 to 8. Use these shortcuts to store any search or sort you run regularly, then run the search with just a click later. After running a transaction search/sort in Pipeline, click "Shortcut" to save it to your "My Shortcuts" menu.

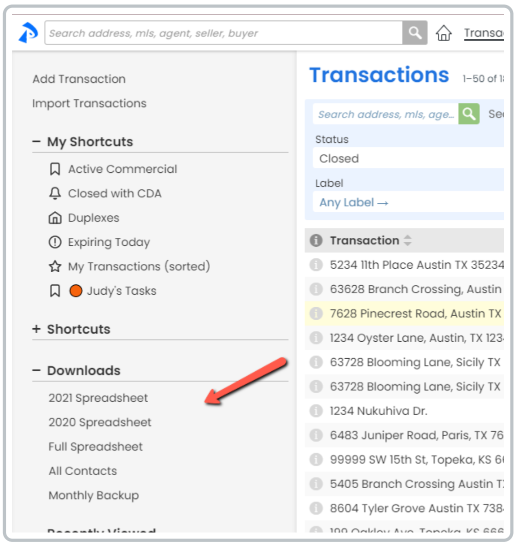


Learn more about Saving Custom Searches & Sorts here →

Automatically reference the More Info field in messages: The More Info field is now an auto-fill tag available to be inserted into reusable message templates. Adding this or other fields to message templates automatically inserts transaction-specific information from the field into the message whenever the template is used to send a message from a transaction. This allows you to effortlessly create very personal and custom messages with a single click. Most customers build (and share!) libraries of wonderfully elaborate messages using bothstandard and advanced auto-fill tags.

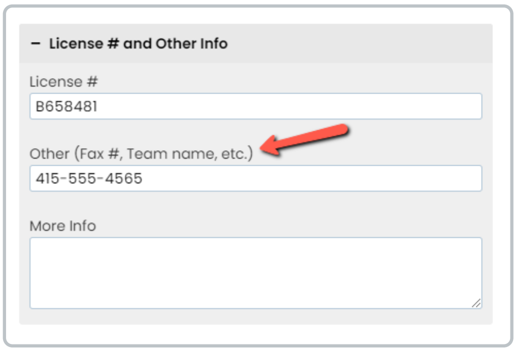
Learn more about Autofill Tags here →
Learn more about Message Templates here →
Learn more about Sharing Message Templates here →

Optional date fields included in transaction downloads: If you've enabled any of theoptional transaction date fields / trigger dates from the Company Settings page, those fields will now be included in transaction downloads.



Learn more about Optional Transaction Date Fields / Trigger Dates here →

"Fax/Other" field label renamed: Heads up that the "Fax / Other" field label you used to see in the License/Fax/Other section of Manage User profiles has been changed to "Other (Fax #, Team name, etc.)". Only the label has changed, so you can continue to store fax number or any other info in that field, as desired.

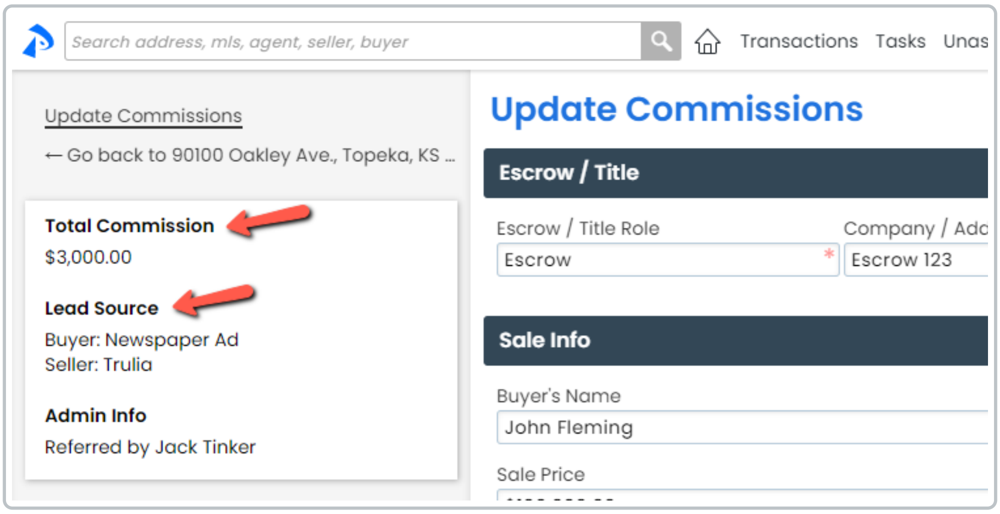


Learn more about Editing User Profiles here →

Admins without Delete permissions can no longer delete docs while merging: Heads up that we've fixed an obscure bug where admins with the "View All Transactions" permission, but without "Delete docs" permissions could elect to "Delete docs after merge" when completing the merge docs process. Without the "Delete docs" permission, they will no longer be able to do so.

COMMISSION MODULE

Easy access to Total Commission and Lead Source: When managing commissions, you'll now see the Total Commission and Lead Source fields displayed on the left of the page.



Learn more about Managing Commissions here →