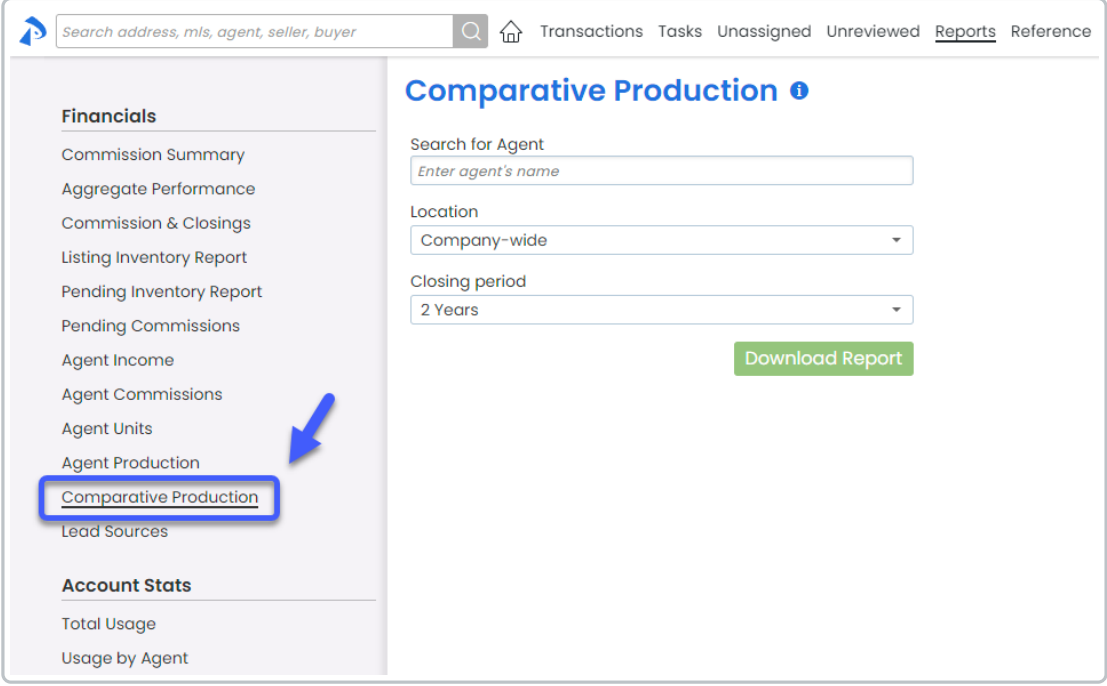


What's New (May 22, 2022)

Compare performance year over year

The new Comparative Production Report allows you to measure seasonal performance by comparing figures for any given month across multiple years, as well as annual totals. Monthly and annual figures are included for sales volume, sales average, number of transactions, and (for Commission Module subscribers) sales units.

[Learn more about the Comparative Production Report here→](#)



The screenshot shows a web application interface. At the top, there is a search bar with the placeholder text "Search address, mls, agent, seller, buyer" and a magnifying glass icon. To the right of the search bar are navigation links: "Transactions", "Tasks", "Unassigned", "Unreviewed", "Reports", and "Reference". Below the search bar, on the left, is a sidebar menu. The "Financials" section is expanded, showing a list of items: "Commission Summary", "Aggregate Performance", "Commission & Closings", "Listing Inventory Report", "Pending Inventory Report", "Pending Commissions", "Agent Income", "Agent Commissions", "Agent Units", "Agent Production", "Comparative Production", and "Lead Sources". The "Comparative Production" item is highlighted with a blue box and a blue arrow points to it. Below the "Financials" section is the "Account Stats" section, which includes "Total Usage" and "Usage by Agent". On the right side of the interface, the "Comparative Production" report is displayed. It has a title "Comparative Production" with an information icon. Below the title are three input fields: "Search for Agent" with a placeholder "Enter agent's name", "Location" with a dropdown menu showing "Company-wide", and "Closing period" with a dropdown menu showing "2 Years". A green "Download Report" button is located below these fields.

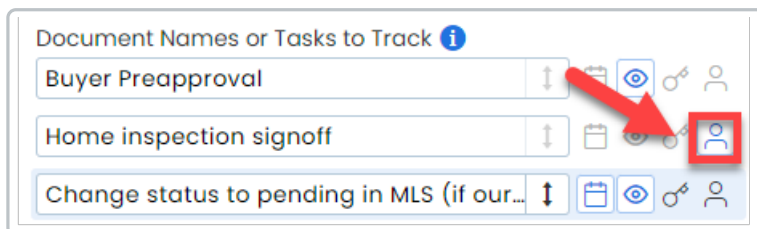
Share checklist timelines effortlessly

You can now easily download and share a spreadsheet of your checklist timelines and their associated information with agents, team members, or clients (for TCs). Hover over a checklist title then click the download icon to download timeline happiness!

[Learn how to Download a Transaction Checklist here →](#)

Let agents update task dates they know most about

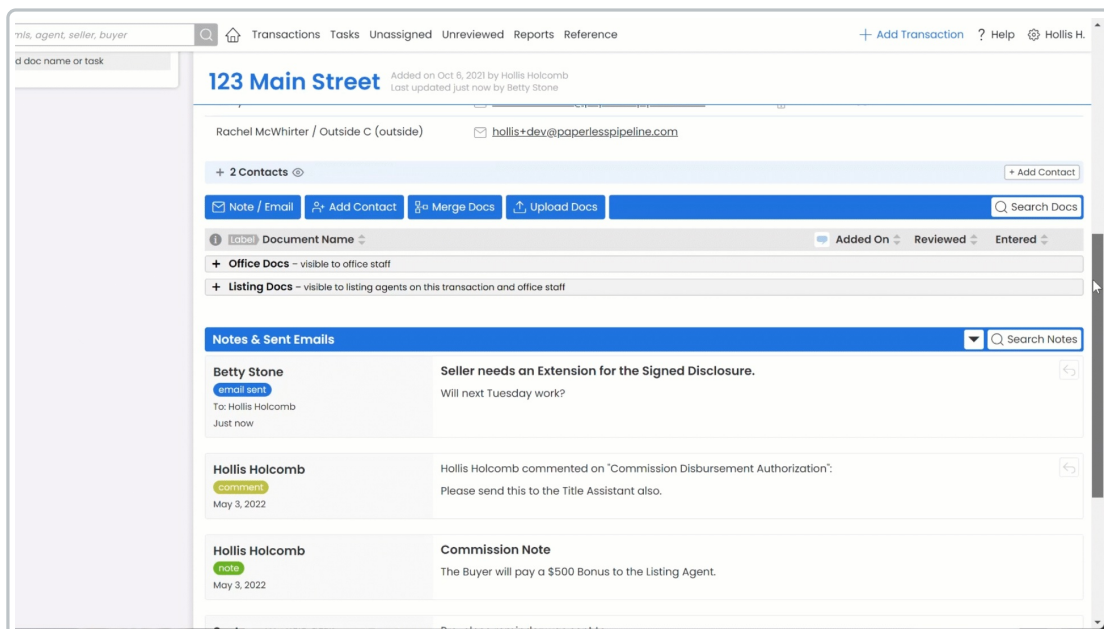
You can now allow agents to change the due dates of non-compliance tasks. From Checklist Templates, designate non-compliance tasks whose due dates are appropriate for agents to update by clicking the Agent icon next to the task.



[Learn how to Allow Agents to Change a Task's Due Date →](#)

Reply to messages with a single click

Quickly reference a message you're responding to in Pipeline by replying to it directly. From the Notes & Sent Emails section, click the Reply icon of any eligible message or comment to reply to the sender and optionally add other recipients.



[Learn how to Reply to Emails in Pipeline →](#)

Insert contact info with a single-click when managing commissions

Inserting contacts to receive deductions or co-op commissions while managing commissions is

now as easy as a single click. From the Fees & Deductions and Co-op Brokerage sections, click the people icon in the lower right corner of the field to quickly select and insert contacts from the transaction.

The screenshot shows a web application interface for managing transactions. At the top, there is a search bar and navigation tabs: Transactions, Tasks, Unassigned, Unreviewed, Reports, and Reference. The main content area is titled 'Co-op Brokerage Commission & Special Instructions' and includes a button 'Edit Prev Step'. On the left, a box displays 'Total Commission \$7,050.00'. The form contains several sections: 'Outside Listing Agent' with fields for Name / Info (Outside Agent / Outside Co.) and Email (hollis+outside@paperlesspipeline.com); 'Outside Selling Agent' with similar fields; 'Cooperating Brokerage' with fields for Amount (\$1,790.00) and Company name / info; and 'CDA instructions (to be shown above Payables)' with a 'CDA Instructions Top' link. A people icon in the bottom right of the 'Cooperating Brokerage' field indicates a contact selection feature.

Find contacts by their company name

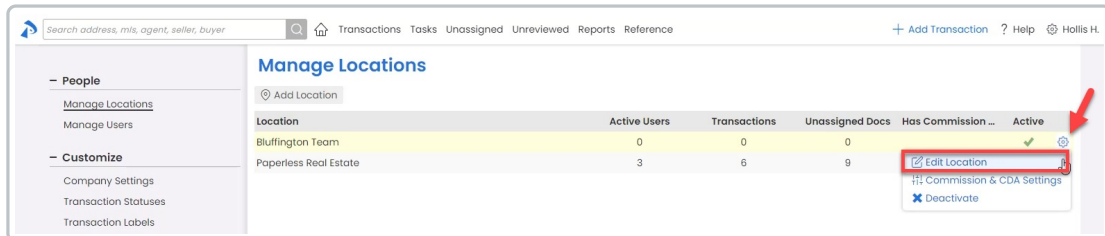
The new "contact-company" global search option allows you to search for contacts based on their company name.

The screenshot shows the Paperless Real Estate dashboard. The header includes a search bar and navigation tabs: Transactions, Tasks, Unassigned, Unreviewed, Reports, and Reference. The left sidebar contains the Paperless Real Estate logo, license number (ZZ-161165181251919), and sections for 'My Shortcuts' (For Broker Review, Key Dates), 'Recently Viewed', 'Admin & Support' (Paperless Admin, hollis@paperlesspipeline.com, (204) 703-8258), and 'Transaction Usage' (Transactions created: 6, Transactions remaining: 4). The main content area features a yellow announcement banner: 'Announcement from your admin: It's official, you've gone Paperless!'. Below this is a 'Search Active Transaction' bar. Further down are two summary cards: 'What's New' and '0 Transactions Closing In 7 Days'. At the bottom, there are two more summary cards: '0 Tasks Due Today' and '9 Unassigned Documents'.

[Learn more about Searching, Sorting, and Downloading here →](#)

Cover Sheets can now include address, phone, etc.

The address, phone number, fax number, and email address of locations can now be displayed on coversheets. Access these details from the Admin menu under Manage Locations by clicking the gear icon next to a location, then Edit Location. If you subscribe to the Commission Module, you've already been enjoying this feature since those location details were already set for any locations that have CDA settings set...they've now just been moved under Edit Location.



Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

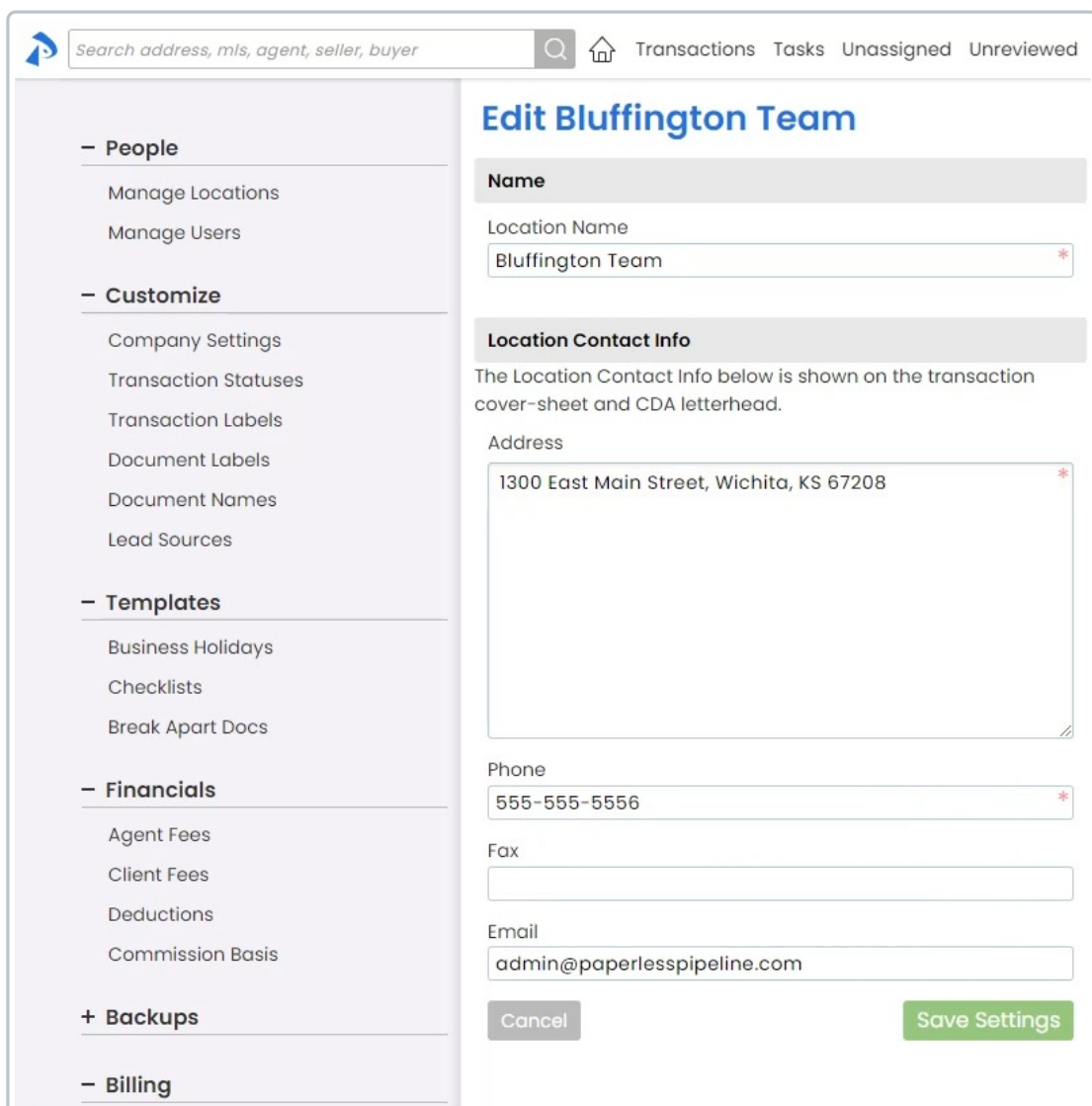
+ Add Transaction ? Help Hollis H.

Manage Locations

Location

Location	Active Users	Transactions	Unassigned Docs	Has Commission ...	Active
Bluffington Team	0	0	0		✓
Paperless Real Estate	3	6	9		

✎ Edit Location
⚙️ Commission & CDA Settings
✖ Deactivate



Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed

Edit Bluffington Team

Name

Location Name

Bluffington Team

Location Contact Info

The Location Contact Info below is shown on the transaction cover-sheet and CDA letterhead.

Address

1300 East Main Street, Wichita, KS 67208

Phone

555-555-5556

Fax

Email

admin@paperlesspipeline.com

Cancel Save Settings

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

Financials

- Agent Fees
- Client Fees
- Deductions
- Commission Basis

+ Backups

- Billing



Paperless Real Estate
 1300 East Main Street, Wichita, KS 67208
 Phone: 555-555-5556 Email: admin@paperlesspipeline.com



Coversheet for 234 Arrow Road

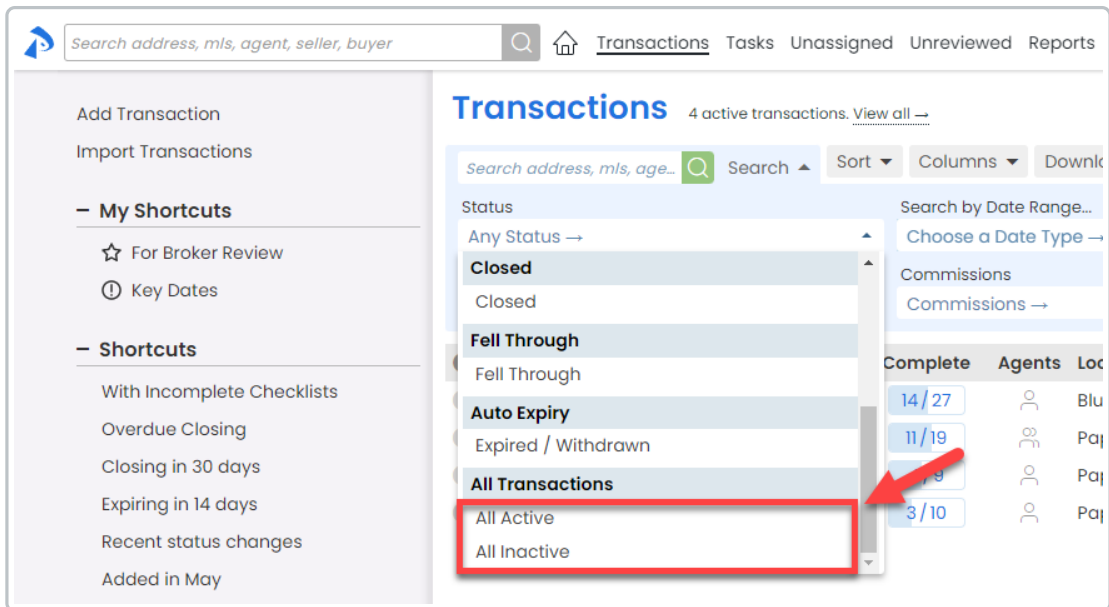
Transaction Info

Property Address: 234 Arrow Road	
Label: Land and Lot	Location: Bluffington Team
Status: Pending	Total Commission: \$10,500
Side: Listing	Added On: Feb 3, 2022

[Learn more about Managing Locations here →](#)

Drill down further into active transaction searches

Ever need to search for transactions that are active (not closed, fell through or expired) along with other search criteria? Now you can! The new All Active and All Inactive search options allow you to build off of those active/inactive statuses as a starting point, allowing you to more easily search for exactly the transactions you need to see.



The screenshot shows the 'Transactions' search interface. On the left is a sidebar with navigation options like 'Add Transaction', 'Import Transactions', and 'My Shortcuts'. The main area is titled 'Transactions' and shows '4 active transactions'. A search bar is at the top. Below it, a 'Status' dropdown menu is open, showing options like 'Any Status', 'Closed', 'Fell Through', 'Auto Expiry', 'All Transactions', 'All Active', and 'All Inactive'. The 'All Active' and 'All Inactive' options are highlighted with a red box. A red arrow points to the 'All Active' option. To the right of the status dropdown, there are filters for 'Search by Date Range...', 'Choose a Date Type...', and 'Commissions'. Below these, a table shows transaction details with columns for 'Complete', 'Agents', and 'Loc'.

[Learn more about Searching, Sorting, and Downloading here →](#)

Help your team know what commission info to gather

You can now insert default information into the Commission Summary field of new transactions (exactly as you can with the More Info and Admin Info fields). From commission percents to

referral fees to whatever info you regularly gather in that field, enter placeholder prompts that will remind your team to enter the information needed. Set your default on the Company Settings page→

Pre-filled default value for "Commission Summary" field

Earnest Money Amount - \$

Commission Percent - \$

Broker Commission - \$

Referral Fee - \$

[Learn how to Set a Default Value for Transaction Fields →](#)