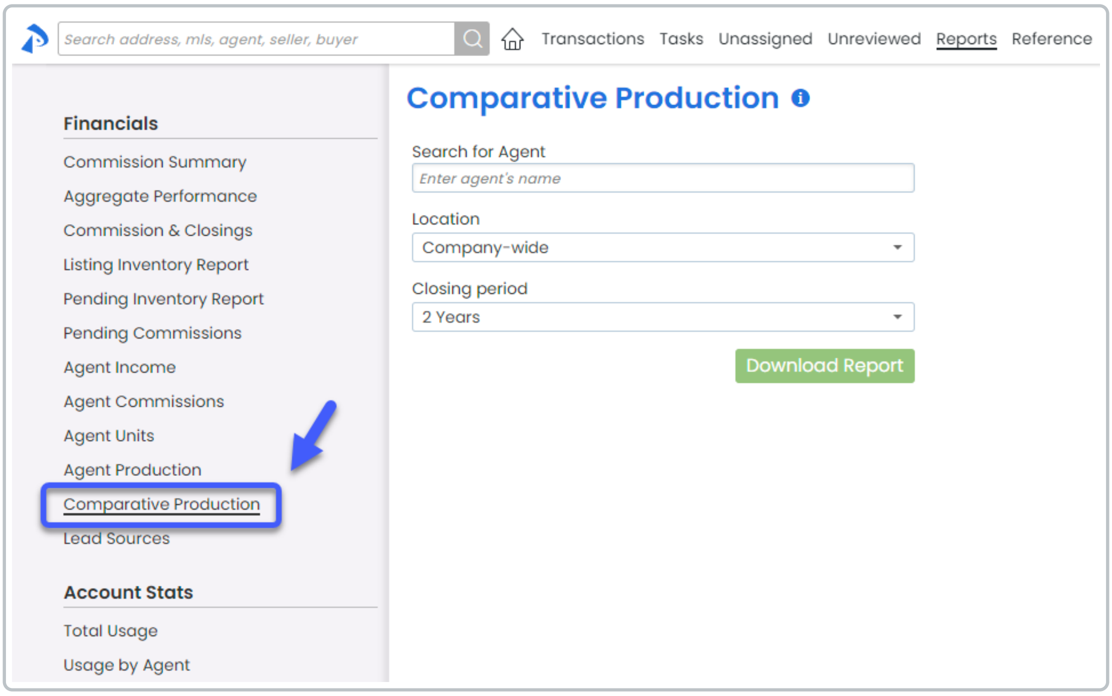
What's New (May 22, 2022)

Compare performance year over year

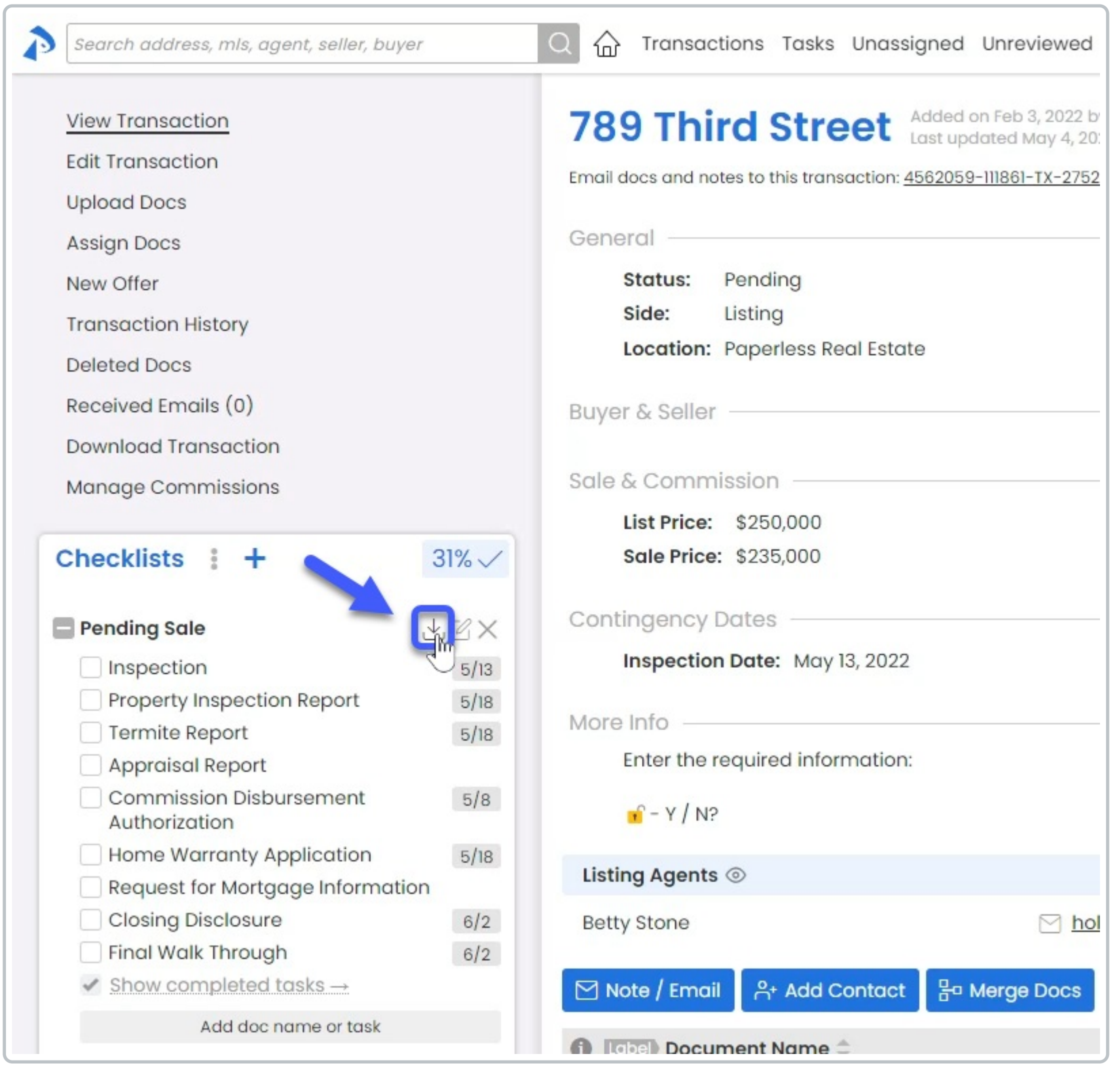
The new Comparative Production Report allows you to measure seasonal performance by comparing figures for any given month across multiple years, as well as annual totals. Monthly and annual figures are included for sales volume, sales average, number of transactions, and (for Commission Module subscribers)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

Learn more about the Comparative Production Report here→

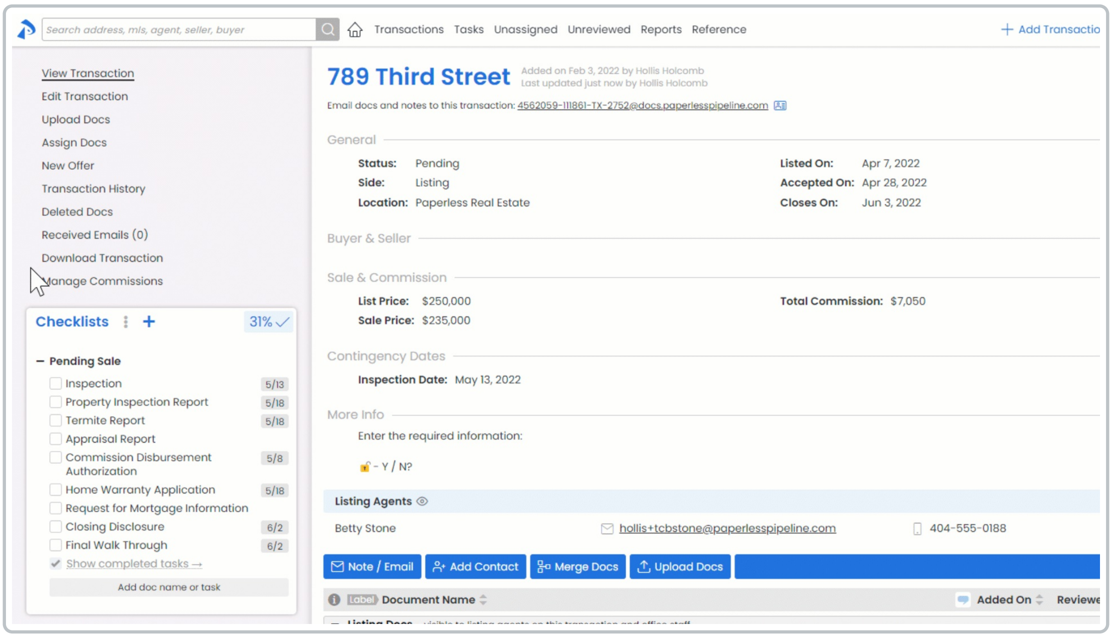


Share checklist timelines effortlessly

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!



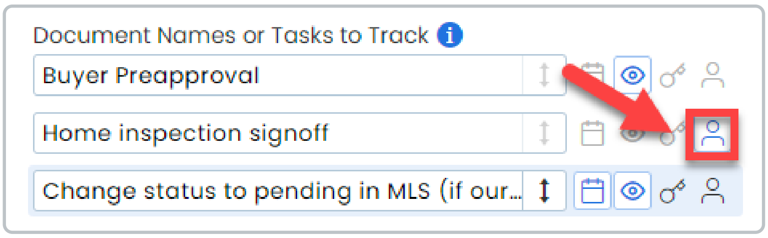
Pro tip: To quickly expand all columns in Excel to match the width of a your specific timeline's data, click the upper left master cell, then double-click any column separator.



Learn how to Download a Transaction Checklist here →

Let agents update task dates they know most about

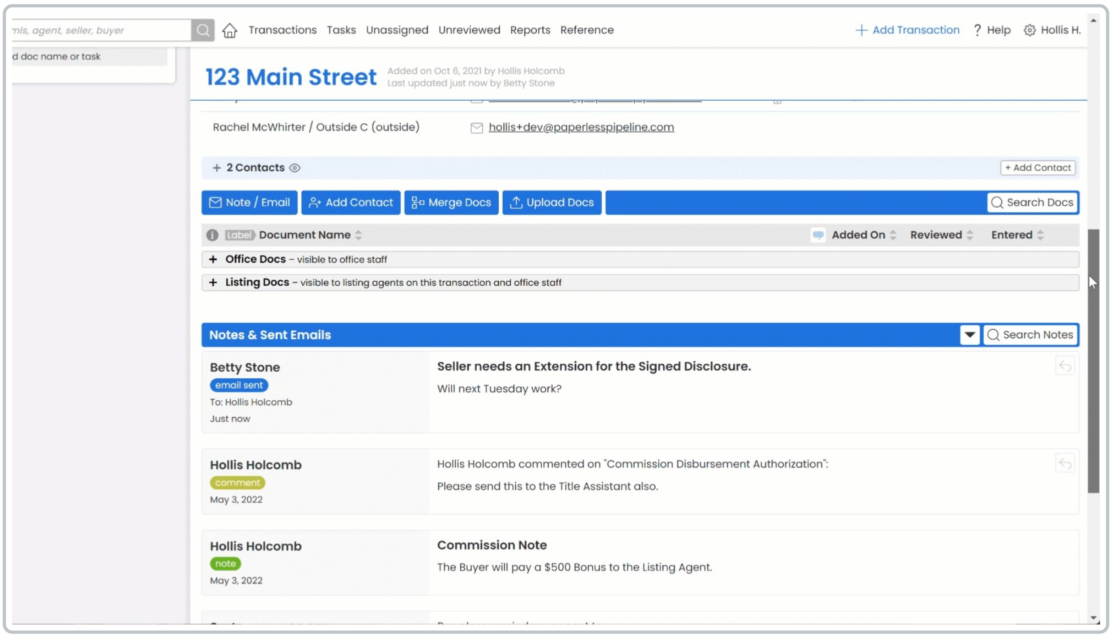
You can now allow agents to change the due dates of non-compliance tasks. From Checklist Templates, designate non-compliance tasks whose due dates are appropriate for agents to update by clicking the Agent icon next to the task.



Learn how to Allow Agents to Change a Task's Due Date →

Reply to messages with a single click

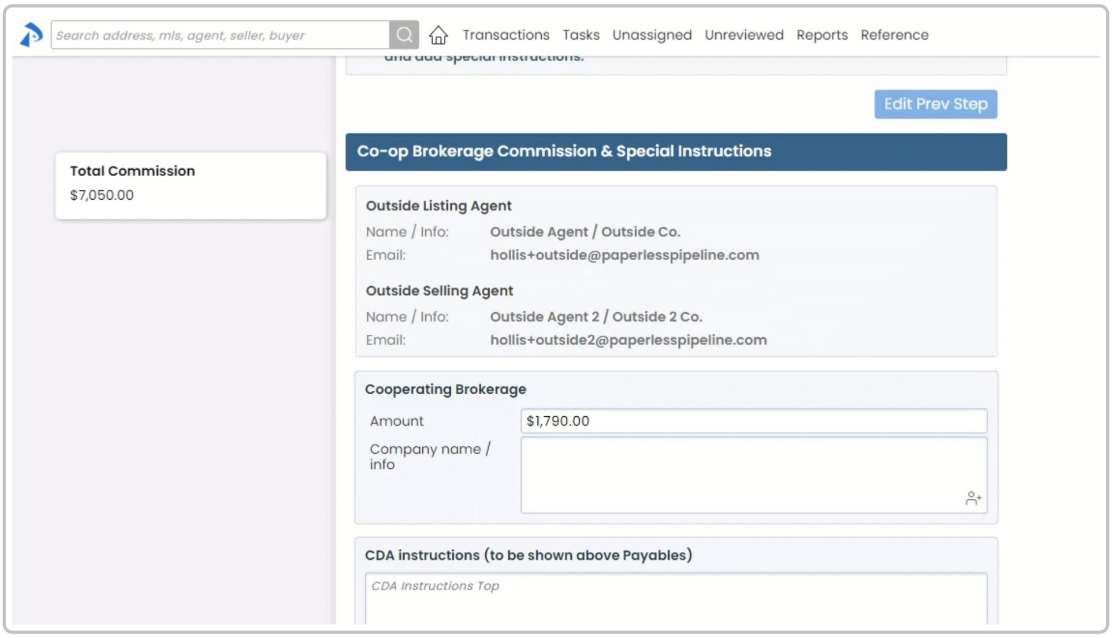
Quickly reference a message you're responding to in Pipeline by replying to it directly. From the Notes & Sent Emails section, click the Reply icon of any eligible message or comment to reply to the sender and optionally add other recipients.



Learn how to Reply to Emails in Pipeline →

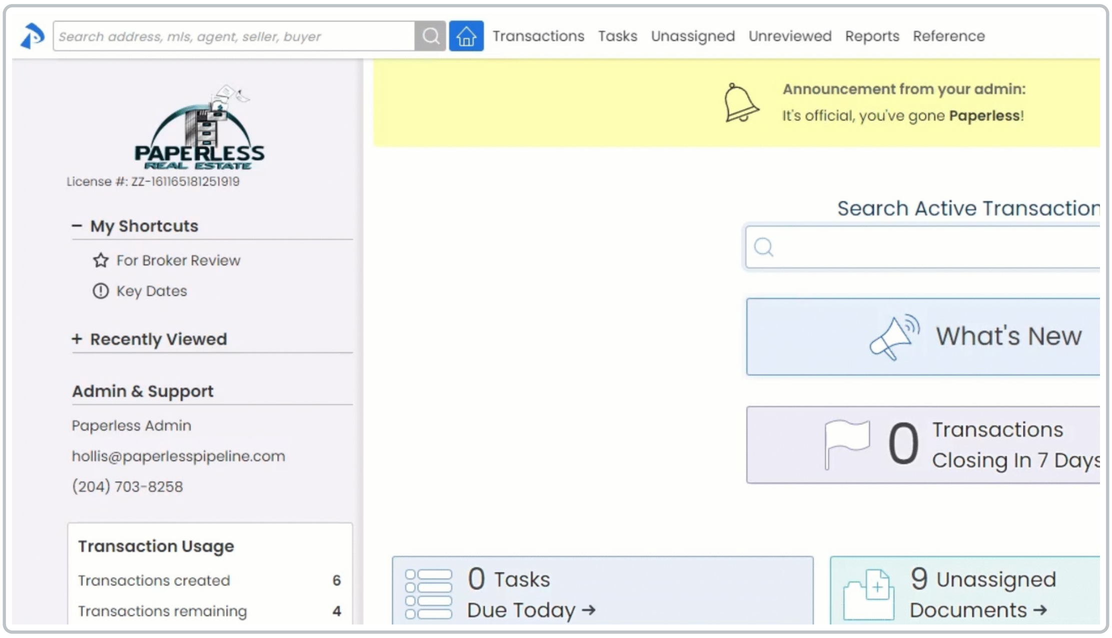
Insert contact info with a single-click when managing commissions

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.



Find contacts by their company name

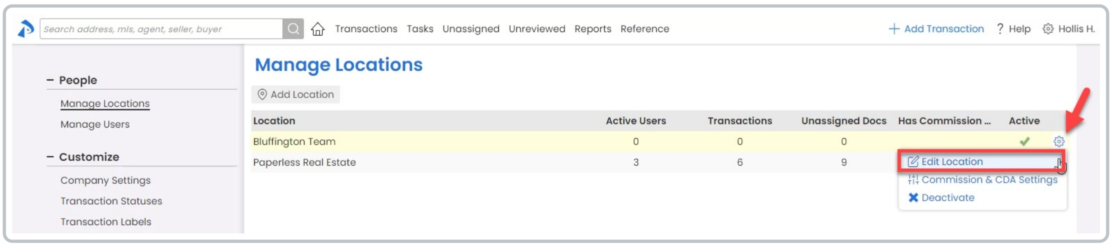
The new "contact-company" global search option allows you to search for contacts based on their company name.

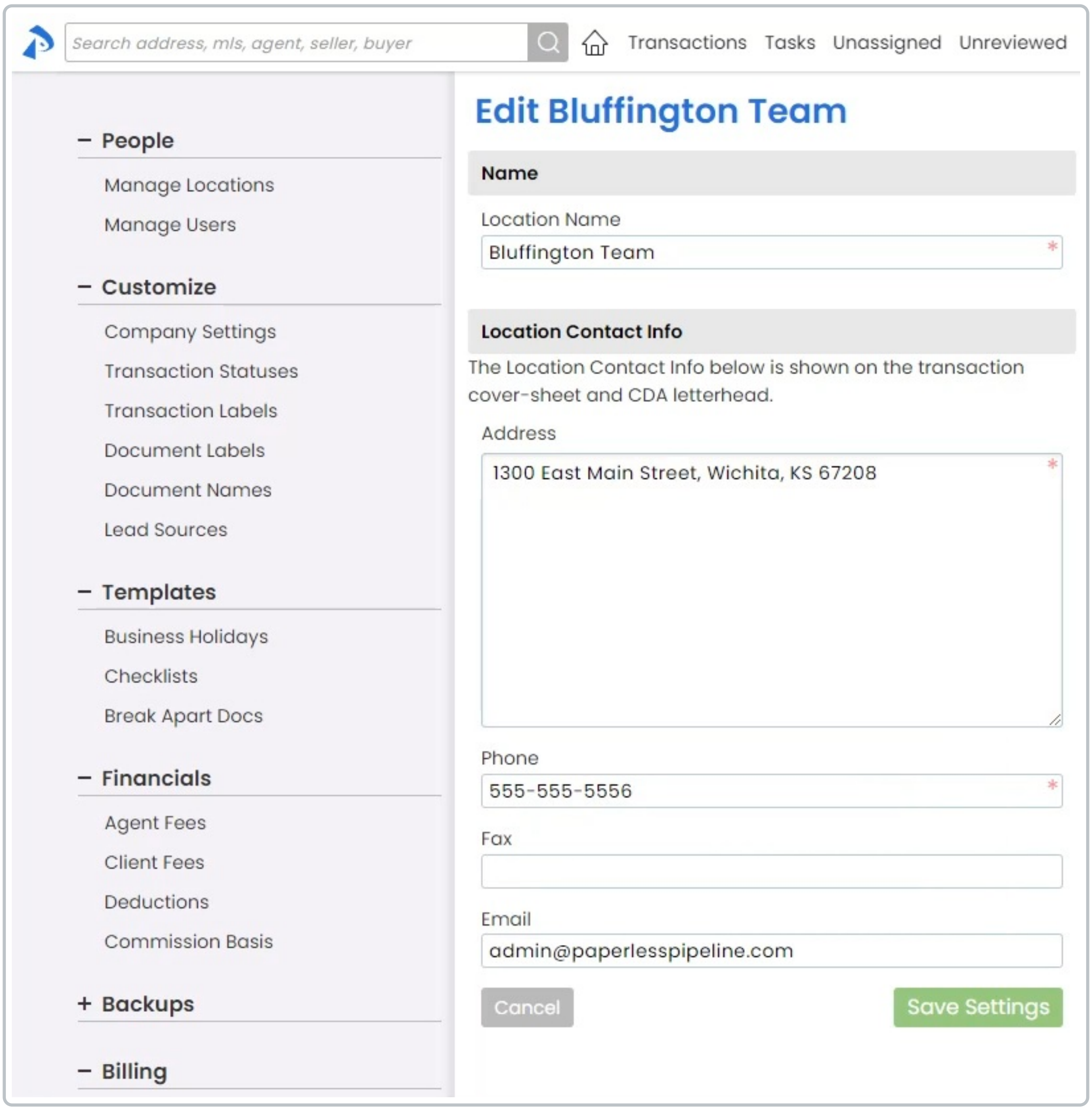


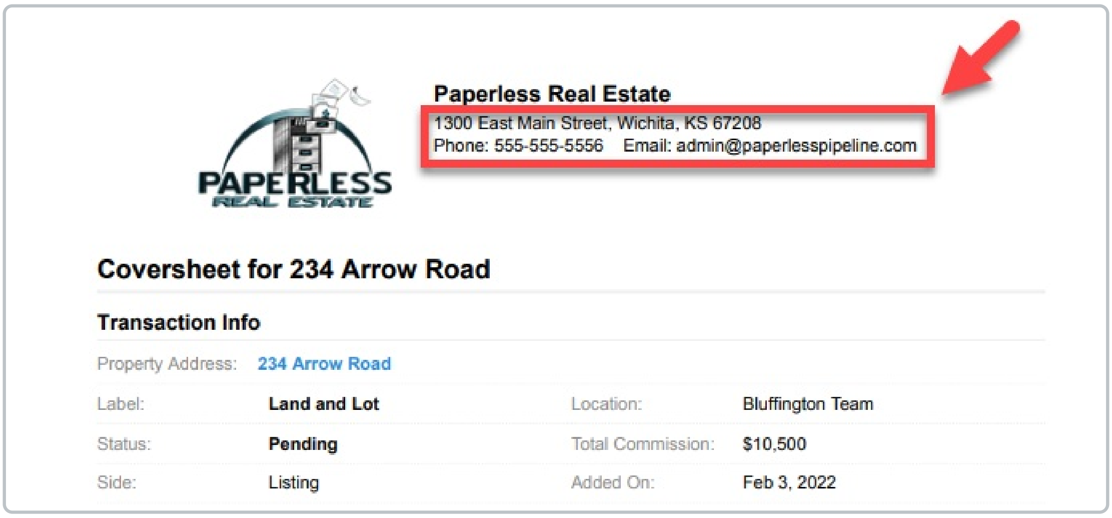
Learn more about Searching, Sorting, and Downloading here →

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.



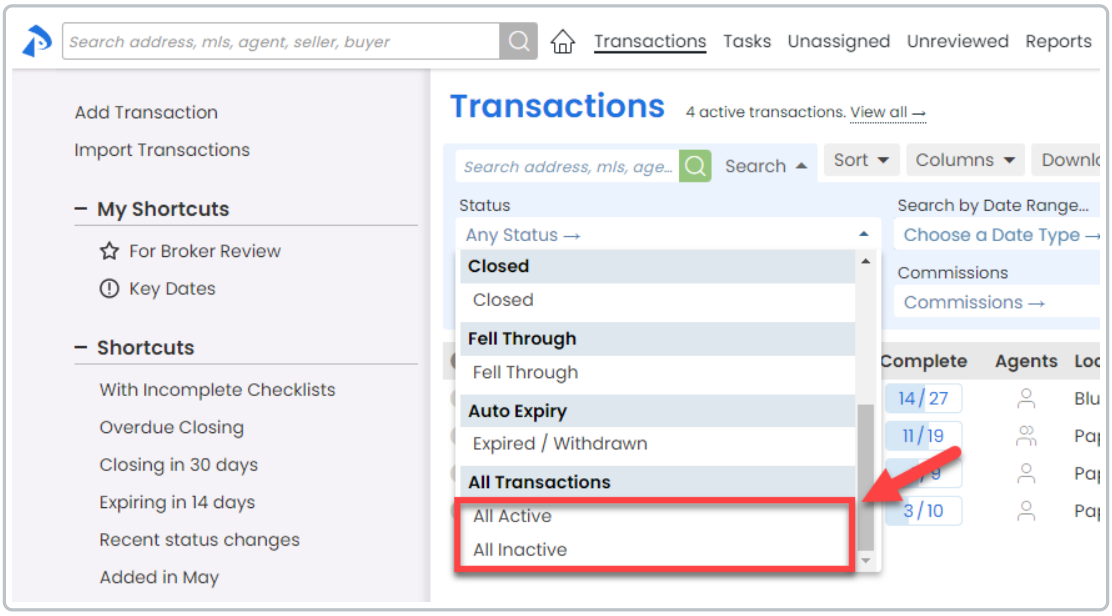




Learn more about Managing Locations here →

Drill down further into active transaction searches

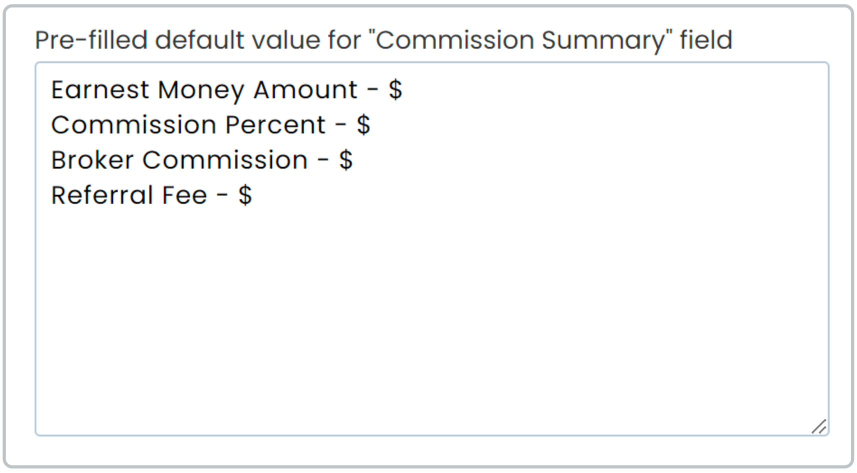
Ever need to search for transactions that are active (not closed, fell through or expired) along with other search criteria? Now you can! The new All Active and All Inactive search options allow you to build off of those active/inactive statuses as a starting point, allowing you to more easily search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



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→



Learn how to Set a Default Value for Transaction Fields →