

What's New (May 7, 2023)

Ensure contact info on transactions is clean and up-to-date

Adding contacts to transactions gives your team at-a-glance access to contacts' information, and allows for effortless [single-click messaging](#) and [contact sharing](#).

The new Contact Management tool helps you ensure those contacts are both seamless to add and error-free. Here's how:

- ***Prevent inaccurate contacts from being recommended***

Make sure your team is adding the correct and most up-to-date information for contacts by ensuring the list they're pulling from is clean and updated.

You can now hide contact information that has been added incorrectly in the past or that is outdated. Hiding inaccurate contacts will ensure those contacts are not recommended to your team when they're adding contacts to transactions in the future, leading to more error-free contacts on transactions.

Contacts

Contacts exist independently on each transaction. This list allows you to update a contact across all its transactions - or - hide (remove) it from the suggested Contacts dropdown menu (displayed when adding Contacts to transactions). Edit contacts directly on this page or click a transaction count to visit the transactions and update them directly there.

Search Contacts

george

Name	Transactions	Last Added
George Jetson	9	Jan 25, 2023

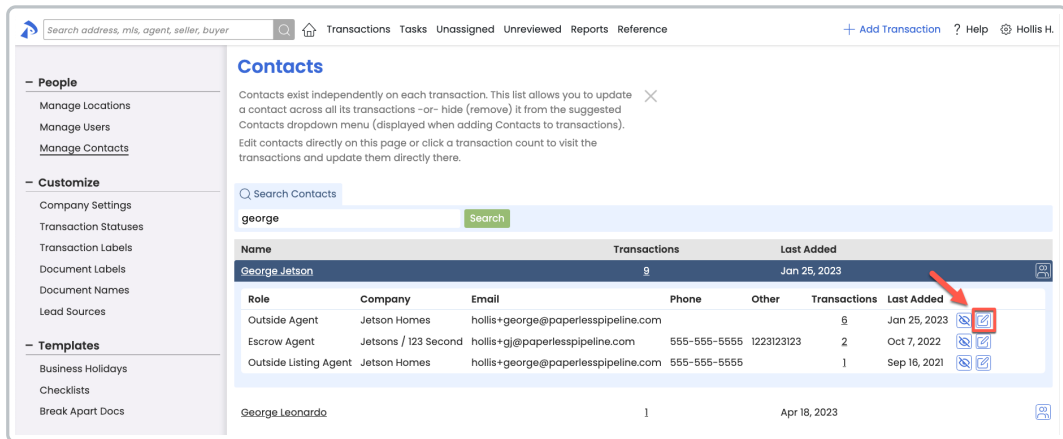
Role	Company	Email	Phone	Other	Transactions	Last Added	
Outside Listing Agent	Jetson Homes	holis+george@paperlesspipeline.com	555-555-5555		7	Jan 25, 2023	
Escrow Agent	Jetsons / 123 Second	holis+gj@paperlesspipeline.com	555-555-5555	1223123123	2	Oct 7, 2022	

George Leonardo 1 Apr 18, 2023

- ***Update incorrect contacts across transactions***

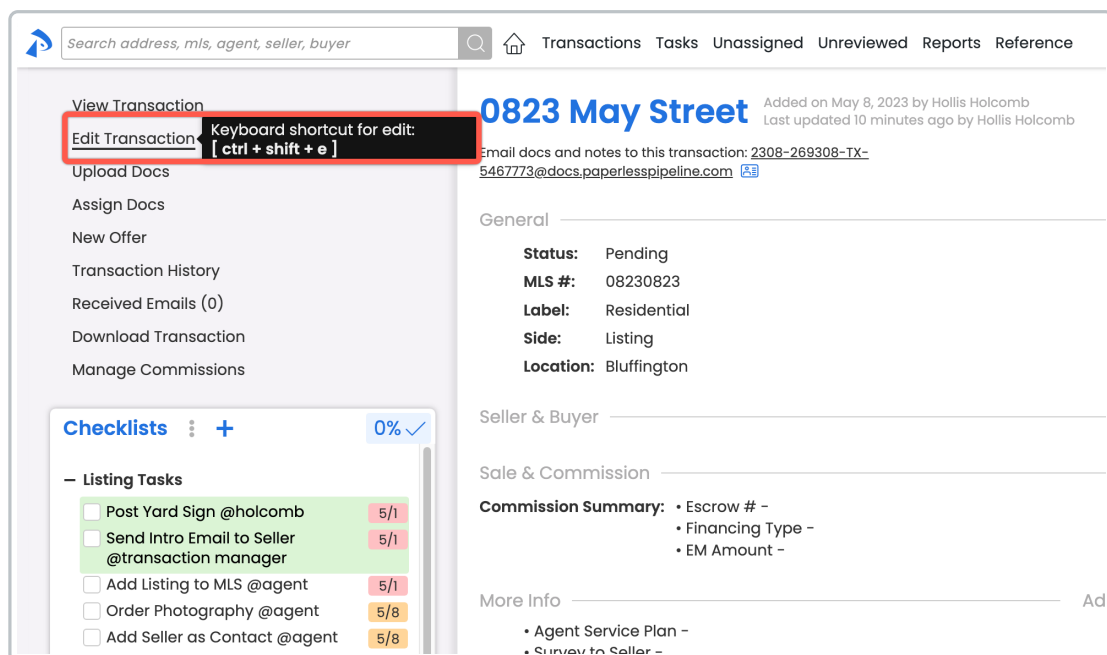
In cases where it's important for incorrect contact information to be updated on the transactions where that inaccurate contact information exists, you can now correct the error across all transactions at once.

[Learn more about Managing Contacts →](#)



Start updating with just a click

Just a friendly reminder (here and on hover of the Edit Transaction link) that you can get to the Edit Transaction page mouse-free by clicking **Ctrl+Shift+E** while viewing the transaction you'd like to edit.



Instantly know when a date rule has been set

Task that have had a due date rule applied, but whose trigger date has not yet been entered, will now have a visual placeholder in place of the missing date. That placeholder will instantly let you know that a rule has been set, but not activated by its trigger date yet.

Search address, mls, agent, seller, buyer

Transactions

Tasks

Unassigned

Unreviewed

Reports

Reference

View Transaction

Edit Transaction

Upload Docs

Assign Docs

New Offer

Transaction History

Received Emails (0)

Download Transaction

Manage Commissions

Checklists

+

17%✓

— Listing Tasks

Order Photography

5/8

Add Seller as Contact

5/8

Add Listing to MLS

-/-

Add Home Photos to MLS

-/-

Add Home Tour Video to YouTube

Send Intro Email to Seller

0823 May Street

Added on May 8, 2023 by Hollis Holcomb
Last updated just now by Hollis Holcomb

Email docs and notes to this transaction: 2308-269308-TX-5467773@docs.paperlesspipeline.com

General

Status:

Pending

MLS #:

08230823

Label:

Residential

Side:

Listing

Location:

Bluffington

Seller & Buyer

Sale & Commission

Commission Summary:

• Escrow # -

• Financing Type -

• EM Amount -

More Info

• Agent Service Plan -

• Survey to Seller -

Ad