

What's New (July 13, 2025)

Create Clean New Buyer Offers in Seconds

When a transaction is buyer-side only, New Offer now works smarter, creating a new transaction that only brings over the buyer-related fields, contacts, and docs you need, and nothing you don't.

There's nothing new to click or learn. Just use New Offer as you always have. The system will detect when the transaction is buyer-side only, and handle the rest.

New Offer for Bryce Jenkins

Copy buyer-related data to a new transaction to manage a new offer

New Offer Information

Transaction name * required

827 Brookstone Blvd (#2)

Status *

Fell Through

☒ Copy over all checklist tasks (except those assigned to listing agents)

☐ Copy over all notes to the new transaction

Cancel Create Offer

The following buyer-related data will be copied from **827 Brookstone Blvd** to a new transaction that can be managed independently:

- All buyer-related transaction field data
- Buying agents
- All docs except sale & listing docs
- All contacts except listing contacts

Send Messages Faster by Selecting Contacts with a Single Click

When sending a note or email from Pipeline, you can now select contacts with a single click.

It's a faster, more intuitive way to visually select contacts, saving you time every time you send.

Agents and staff can still be checked from within the blue area when sending.

[Learn more about Sending Notes & Emails here →](#)

ear to Close

ate and Time

sks

me or task



Cleaner Message Layout: Subject Now Lives Inside the Message Box

Heads up that when sending a note or email, the Subject field is now contained within the message box.

Same workflow, just a cleaner, more streamlined layout.

[Learn more about Sending Notes & Emails here →](#)



Subject

Aa

Subje

Type