What's New in Paperless Pipeline

SUMMARY
This article lists the latest Paperless Pipeline updates.

Visit the blog for update details →

RELEASE DATES

April 22, 2019
March 18, 2019
January 14, 2019
September 16, 2018
August 24, 2018
July 30, 2018
May 16, 2018
April 1, 2018
Oct 8, 2017
Jun 29, 2017
April 2, 2017
Jan 24, 2017

Older Updates →
Commission & Reporting Module Older Updates→

April 22, 2019:

**Bulk add doc names:** When setting up Standard Document Names, paste in your list of doc names to save time and minimize errors.

Learn how to bulk add doc names here →
Agent communication of task completion: Agents can indicate to admins that they have completed a task by checking the task’s checkbox. Tasks checked by agents will display a special indicator which lets both agents and admins know when a task has been completed.

Share checklists with a single action Need to send a list of all the tasks on a checklist instead of just one or two? Drag and drop a transaction’s entire checklist onto the message area of a note or email to share its tasks.

Learn how to drag and drop checklists here →

March 18, 2019:

Hide completed tasks on transaction checklists Make checklists cleaner and easier to work with by setting completed tasks to be hidden on transaction checklists. Hidden tasks can be displayed at any time with a single click.

Learn how to hide completed tasks here →

Customize your Tasks and Unassigned Docs lists Display the fields that make the most sense for your workflow, and hide the fields you don’t need to see. Removing unneeded fields from these pages will also increase space for the fields you do use.

Learn to show and hide fields here →

More fields displayed on reports: Several fields can now be viewed on designated Commission Module reports allowing you to analyze commissions and performance more easily. They include:

- View Sales Volume on the Commission Summary page
- View Listing & Selling Volume on the Commissions & Closings report
- View Client Fees on the Agent Commissions report.

Filter Commission Module reports by transaction label: Use the Label
filter to report on commission numbers based on transaction type and generate reports that have only the data you need.

Learn more about Transaction Labels here →

January 14, 2019:

**On-demand transaction reporting:** Build (and save) custom reports that pull the exact transactions you need to see. The Advanced Search area allows you to combine search and filter criteria for all the primary transaction fields, including date fields, saving you the time of manually excluding unneeded transactions.

Learn more about Advanced Search here →

September 16, 2018:

**Track lead sources to measure the effectiveness of your advertising campaigns:** Record buyer and seller lead sources on transactions. View a lead source aggregate report. View lead source information on other financial reports.

Learn more about lead sources here →

August 24, 2018:

**Customize your message templates with automatic (auto-fill tags):** Select from a list of auto-fill tags when creating a message template. The system will automatically replace each tag with the appropriate value from the transaction whenever you use the template to send a note from a transaction. Learn how to use auto-fill tags here →

July 30, 2018:
Copy doc comments to messages in one click: Instantly copy your doc comments into a note or email by dragging them into the message area. Learn how here →

Include contacts when sending a coversheet. Now you can choose whether you’d like contacts to be included when emailing a coversheet from a transaction.

May 16, 2018:

COMMISSION MODULE

View Transaction Gross Commission and Franchise Fee on Agent Income Report: The Agent Income Report now includes Transaction Gross Commission and Franchise Fee amounts, allowing you to see the total commission produced by the agent before the franchise fee has been deducted.

Apr 1, 2018:

View more information about an agent by hovering over their name on a transaction: Admins can view an agent's start date, license number, and more info by hovering over an agent's name on a transaction. Agents are not allowed to see each other's information by this method.

External recipients of email messages can see and reply to all recipients: When external contacts who receive an email message sent from Paperless Pipeline REPLY ALL to the message, all recipients on the message will now receive the reply. Previously, external recipients were not shown internal recipients of a message and thus could not include them when replying.

Plus dozens of fixes and improvements.
COMMISSION MODULE

Receive assistance with multi-tier commission splits: When entering commission information for a transaction, you will receive a warning if any agent is about to surpass their commission split threshold and needs to be processed on multiple tiers of splits.

Look up agents' year-to-date and previous month's commission figures: Admins can access agents' YTD and previous month's commission figures directly from the Reports section. Agents will continue to receive their YTD and previous month's commission figures monthly by email for offices that have turned on that setting.

View in-house referral commissions during CDA generation: An agent's in-house referral commission figures will now be included in the YTD totals box displayed on the right hand side during CDA generation.

Plus dozens of little fixes and improvements.

Format notes and send structured emails from transactions: Format transaction notes and messages with bolded text, italics, bulleted lists, etc. Pipeline now supports the popular and easy-to-learn Markdown formatting method to give you better control over the appearance of your transaction notes.

Private Notes! Keep transaction notes visible only to sender and recipients. When adding a transaction note, you can now mark it as private with a single click. A private note is only shown to its author (i.e. sender) and recipients in the Notes & Sent Emails section of the transaction. Previously,
all notes were shown to all users who had access to the transaction.

**Copy and paste multiple tasks in one shot when setting up checklist templates:** Paste in a list of tasks with one click to save time and minimize errors when setting up checklist templates.

**Hide checklist completion percentages from agents to simplify agents' view of transactions:** Uncheck the company-wide setting "Show checklist completion percentages to agents" to prevent your agents from seeing checklist completion percentages across their transactions. This can eliminate agents' confusion if the percentages reflect tasks that agents are not able to view.

**Plus scores of small improvements.**

**Read the blog post for more info →**

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**COMMISSION MODULE**

**Drill down Commission Summary data:** Click figures on the Commission Summary report to see the Pending or Closed Transactions that were used to calculate those figures.

**And scores of small improvements.**

**Read the blog post for more info →**

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**Jun 29, 2017:**

**Recover deleted docs:** Master admins and document deleters can recover docs deleted from transactions as well as unassigned docs. Click the "Deleted Docs" option from the left-hand menu of the transaction or the Unassigned Docs section to locate and download the deleted doc. Then re-upload it to the system if needed. **Learn how this works here →**

**Keep your computer logged in for 7 days:** When logging in to Pipeline, you
can now select the option called "Stay logged in for 7 days". For security, be sure to only use this option from your own computer and own secure network. Learn more here →

Buyer and Seller email addresses included in transaction downloads: Need to send an email to buyers or sellers? Download transaction spreadsheets to access email addresses of buyers and sellers. Learn how to download spreadsheets here →

Open next/previous document previews with new keyboard shortcuts: Now you can use Shift + ↑ and Shift + ↓ (Shift plus up or down arrow on your keyboard) to quickly open the preview of the previous or next docs when in any document list.

New high-contrast color theme: Pipeline's new high-contrast color theme offers distinctive lines and colors, helpful for color-blind and visually impaired people. Learn how to apply the new color theme to your account here →

View new offer status right from its original transaction: Hover over a transaction's new offer to instantly see that offer's current status and creation date.

And scores of small improvements.

Read the blog post for more info →

COMMISSION MODULE

Filter the Pending Commissions Report by acceptance date.

Commission Disbursement Authorizations and Financial Info now saved within monthly backups and downloaded transactions: Monthly backups and downloaded transactions will now include CDAs and all other financial info.

And many small improvements.
Quickly search a transaction's documents: There's a new search option above the documents area of every transaction. Use it to instantly locate a document.

And many more small improvements.

COMMISSION MODULE

Agents can receive a monthly commission report that summarizes their year-to-date and last month's production numbers: Turn this feature on or off from the Admin Settings page using the checkbox "Email monthly production summary to agents".

Generate reports based on any date range: From a report's "period" dropdown list, select the option "Custom Date Range", then specify the desired start and end dates.

Search transactions based on whether they have commission data entered or not: From the Transaction's page, go to the Advanced Search section and use the new "Commissions" filter.

The "Generate CDA" option has been renamed to Manage/Update Commissions: How you enter a transaction's commission data hasn't changed. Just the menu option now appears as either Manage Commissions or Update Commissions.

Rename franchise fee to match your company's naming conventions: If your office pays a franchise fee but calls it by a different name, now you can
specify that name.

Read the blog post for more info →

Jan 24, 2017:

Admins, you can now share your saved message templates with agents. Previously you could only share with other admins.

**Easily scan transaction notes:** Transaction notes are now shown collapsed. This will make it easier for you to scan them quickly. A green triangle at the right of a collapsed note will let you expand that note.

**Search transaction notes:** On the top right corner of the Notes area, there’s now a "search notes" box allowing you to quickly locate notes that match a search phrase.

**Easily set up standard doc names from tasks and tasks from standard doc names:** Now when creating checklist tasks, the system will auto-suggest matching document names. Similarly, when creating standardized document names, you will see matching task names being automatically suggested.

**Know if your attached files will be emailed as links or as attachments:** Whenever you attach more than 5 megabytes worth of docs to your emails, the system always sends those as downloadable links rather than direct attachments. Now the system will warn you whenever your selected docs will be sent as links.

**And several general improvements.**

Read the blog post for more info →