# What's New

View the latest Paperless Pipeline updates.

# September 6, 2025

## Keep Your Transaction Documents Neatly Grouped—Automatically

**Please alert your team of this new feature for the smoothest transition.** 

Pipeline's new Automatic Document Name Grouping helps your transaction doc lists stay clean and easy to navigate. Documents with the same base name are now collapsed into a single, tidy group, showing only the most recent or designated version of the doc by default.

Here's how it works. Docs that share the same base name (the text before any parentheses) will be grouped. The most recent (or designated) doc will be displayed by default, while the rest will be collapsed behind it, accessible with just a click, if ever needed.

**No setup needed**. Most offices' normal naming convention will already take advantage of the grouping naturally.

If your office prefers that your similarly named docs**not** be grouped, no sweat! Just turn the *Group documents by name* feature **off** under Company Settings .

Search address, mis, agent, seller, buyer 🔾 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help ③ Hollis A. 71% 🗸 Checklists : + 4318 Oak Way Added on Dec 5, 2024 by Hollis Admin Last updated just now by Hollis Admin 1 Day on market - Listing - Live Sale & Cr Activate Listing in MLS 9/3 Send Live Listing Link to Sellers 9/3 Post "Just Listed" Photo on Social 9/3 List Price: \$705,406 Listing Agents © Alice Parker Mollis+alice.parker@paperlesspipeline.com . (555) 223-7810 Set Up Showing Calendar 9/3 Open House Flver 9/3 - 1 Contact () Order Added
 + Add Contact Add doc name or task Alex Smith, Seller hollis+seller.alex.smith@paperlesspipeline.com + Listing - Coming Soon Mote / Email Add Contact 🛛 🗐 Send to D ilgnature 🖁 🗠 Merge Docs 🟦 Up Q Search Docs Sign 🛛 🛷 Se 🚯 🕼 😳 Document Name 🗘 🏳 Added On 🗘 🛛 Reviewed 🗘 - Office Docs - visible to office staff 9 mins ago - Listing Docs - visible to listing agents on this transaction and office sta Comparative Market Analysis (CMA) 5 mins ago Estimated Cost Sheet 5 mins ago ~ Lead Based Paint Disclosure 5 mins ago ٢ Listing Agreement (Renewal) 3 1 min ago 5 mins ago MLS Exclusion Form 3 MLS Input Sheet 5 mins ago Contr Sellers Agency Disclosure 5 mins ago Image: Ima Contr Sellers Property Disclosure 5 mins ago Wire Fraud Disclosure (Corrected) 2 Just now 0

Learn more about Automatic Doc Name Grouping here  $\rightarrow$ 

NEW Message Template Library: Ready-to-Use Messages in Seconds

Pipeline's Message Templates let you draft messages instantly. The new Message Template Library makes it easy to expand your collection of templates. Find, copy, and customize a wide variety of professional, ready-made templates for every step of your workflow, including client updates, helpful reminders, and more.

#### Highlights:

- Browse and copy prebuilt templates
- Easily customize templates for your needs
- Admin-only templates are hidden from agents
- No setup required—access from the My Info | Template Library
- Share copied templates with your team, like normal

Browse the Message Template Library today to see if any are right for your team.

Search address, mls, agent, sel	er, Q A Transactions Tasks Unassigned Unreviewed			
Account Info	Copy any of these commonly-sent message templates into	your account then customize them to fit your needs		
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	<u>Closing Confirmation to Lender</u>	[Confirmation of closing for {{buyer name}}	Closing	{
Pipeline eSign	Closing Confirmation to Seller	We're almost there! Final confirmation for your clo	Closing	{
Signature Requests	Closing Congratulations to Buyer	The keys are all yours! Congratulations.	Closing	{
Drafts	<u>Closing Congratulations to Seller</u>	The deal is done! Congratulations.	Closing	ę
Message Templates	Closing Funds Instructions to Buyer	Time to prepare your closing funds	Closing	{
My Templates	Final Walk-Through Coordination to Buyer	Time to Schedule the Final Walk-Through	Closing	Ę
Scheduled Messages	Final Walk-Through Coordination to Seller	Time to Schedule the Final Walk-Through	Closing	Ð
lemplate Library	Final Walk-Through Scheduled to Buyer	Walk-Through Scheduled — See You There	Closing	6
	Final Walk-Through Scheduled to Seller	Buyer Walk-Through is Set — Here's What to Know	Closing	Ę
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apier	Compensation Disbursement Confirmation	Compensation Disbursed	Compensation and Payouts (Admin)	Ę
	Compensation Holdback Notification	Compensation Holdback	Compensation and Payouts (Admin)	{
My Info	Deliver CDA to Title	ICDA - {{transaction name}} ({{close date}})	Compensation and Payouts (Admin)	

## **Find Assignment Details Fast**

You can now search all key fields in Assignment History to quickly find the exact details you need.

This makes Assignment History the perfect tool for tracking what happened to an uploaded document, who took action, and when.

Search address, mls, agent, seller, Q	Transactions Tasks <u>Unassigned</u> Unre	viewed Reports Reference		-	+ Add Transaction ? Help 🛞 Holli
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+ Recently Updated View all	<ul> <li>Listing Agreement (Price Update)</li> </ul>	4318 Oak Way	Pine Realty	💭 Sep 4, 2025	Hollis A.
	Sellers Property Disclosure	4318 Oak Way	Pine Realty	💭 Sep 4, 2025	Hollis A.
+ Recently Created View all	MLS Input Sheet	4318 Oak Way	Pine Realty	💭 Sep 4, 2025	Hollis A.
	MLS Exclusion Form	4318 Oak Way	Pine Realty	💭 Sep 4, 2025	Hollis A.
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	Comparative Market Analysis (CMA)	4318 Oak Way	Pine Realty	💭 Sep 4, 2025	Hollis A.
	Scanned Docs	4318 Oak Way	Pine Realty	💭 Sep 4, 2025	Hollis A.
	Listing Agreement River Street	399 Forest Road	Fred's Team	💭 Aug 14, 2025	Hollis A.
	Affiliated Business Disclosure	399 Forest Road	Fred's Team	💭 Aug 14, 2025	Hollis A.
	Appraisal Report	123 Main Street	Pine Realty	💭 Aug 14, 2025	Hollis A.
	Commission Disbursement Authorizati	399 Forest Road	Fred's Team	Aug 13, 2025	Hollis A.

#### Minor Navigation Updates: Find What You Need, Faster

You might notice a few small changes to Pipeline's navigation. We've moved a few items to more intuitive locations to help you find what you need, faster. If you're missing something, glance around—it should be close by.

#### **Pipeline eSign**

#### Track and Manage Your Team's eSign Drafts

Drafts of eSign signature requests make it easy to save signature requests mid-preparation or set them aside for review. Now, admins can view eSign drafts for transactions in the locations they manage—access previously limited to Master Admins.

This new access lets admins review signature requests before they're sent, and easily track or support eSign draft activity across their team.

From their Drafts page, Admins can still manage their own drafts, or click [Company-wide] to view all eSign drafts in their location.

Learn more about Managing Company-Wide eSign Drafts here →

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Company-wide Drafts				
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Doc Name	Creator	Updated	Initiated From	Action
Escrow Instructions Form	Otis Boykin	Jul 28, 2025	Reference Docs	1
Buyer Brokerage Agreement	Hollis Holcomb	Jul 28, 2025	Reference Docs	1
Kayak Page 2	Marian Croak	Jul 23, 2025	3266 Hearthwood St	7
Lead Based Paint Disclosure	Hollis Holcomb	Jul 16, 2025	9711 Maple Rd	1

# 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.

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Fell Through	All buyer-related transaction field data
Copy over all checklist tasks (except those assigned to listing	Buying agents
agents)	All docs except sale & listing docs
	All contacts except listing contacts
Copy over all notes to the new transaction	

#### 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 →

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sks	Sarah Boone	hollis+sarahboone@paperlesspipeline.com	(555) 245-6839	
me or task	Otis Boykin assistant	hollis+otisboykin@paperlesspipeline.com	(555) 225-7353	
$\checkmark$	- 2 Contacts		Order Added	+ Add Contact
	Jan Staples, <b>Seller</b> 123 Maple Street	hollis+jan@paperlesspipeline.com	. (555) 555-4533	
	Richard Staples, <b>Seller</b>	hollis+richard@paperlesspipeline.com	. (555) 555-4534	
	전 Note / Email 🐣 Add Contact 🥱	🕈 Send to DocuSign 🛛 🖈 Send for Signature 🖁 🖧 Merge Docs	s 🕂 Upload Docs 🔓	Q Search Docs
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### **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 →

🖂 Note / Email 🛛 🐣 Add Contact 🛛 🦪 S	Send to DocuSign 🛛 🚿 Send for Signature	Ba Merge Docs ሰ Upload	Docs 🔓 Q Search D
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Listing agents	Staff (1)		
Sarah Boone	Hollis Holcomb		
Otis Boykin			
Send to an external email address 🚯			Message Templates
hollis+richard@paperlesspipeline.com hollis+jc	an@paperlesspipeline.com Enter email address	es + bcc	- Choose a saved message template -
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# April 27, 2025

Send Reference Docs Directly from Transactions

Save time and steps by attaching Reference documents directly to messages you send from transactions. It's a fast, natural way to share the docs your team uses everyday, right from where you're already working.

Just like everything else you send from a transaction, these messages are automatically tracked in the transaction's history and Notes & Sent Emails, keeping all communication in one place.

Learn how to Email Docs & Notes from Transactions →

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**Next up**: Sending Reference docs from transactions is a precursor to the exciting launch of Pipeline eSign, our upcoming built-in forms and digital signing platform.

**Want early access to Pipeline eSign?** Reply to this message and we'll reach out with more information.

# October 20, 2024

Save Time on New Offers by Not Having to Remove Buyer Side Contacts

When initiating a New Offer on a transaction, any buyer-side contacts will no longer be carried

over automatically. This means you can now enter fresh buyer contacts on New Offers without the hassle of manually removing old ones.

Buyer-side contacts are defined as those containing any of the following words:

- "Buyer"
- "Lender"
- "Lending"
- "Escrow"
- "Title

Heads up that we'll be adding more buyer side offer options in the very near future.

Learn more about New Offer  $\rightarrow$ 

### Instantly View Timestamps for Notes & Sent Emails-No Hover Needed

Need to know exactly when messages were received or other actions took place on a transaction *without* having to hover over the date. You can now set the times that actions took place to be automatically visible—no hover needed.

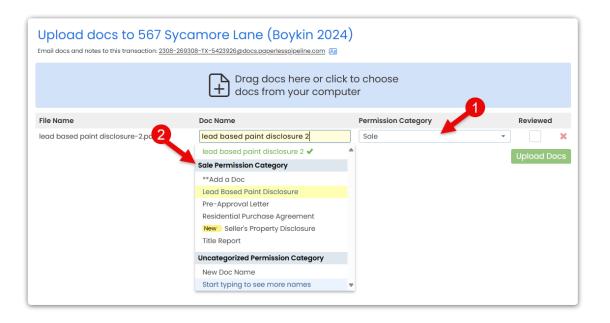
To turn on visible timestamps, scroll down to the *Notes* & *Sent Emails* section on any transaction, click the Settings dots [:], then [Show timestamps]. The system will remember your selection and show (or hide) the timestamps on every transaction.

Search address, mis, agent, seller, bu	iyer Q	☆ Transactions Tasks Unass	igned Unreviewed Reports Reference	+ Add Transo	action ? Help	Hollis Hollis I
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		email sent To: Hollis Holcomb	On October 22, 2021 - 12:23 p.m. ET, Hollis Hol	lcomb hollis@paperlesspipeline.com w	vrote:	
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			Constatulations on the nurshapp of your n	awhamal 🦚 🗛		
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		Hollis Holcomb				
		email sent	These incomplete tasks were included:			5

#### Name Your Docs Even Faster!

When naming docs in Pipeline, the dropdown list of your office's Standard Doc Names just got smarter. If your Standard Doc Names have been set up with pre-set Permission Categories, the system can prioritize showing the appropriate doc names when naming docs.

To display the list of docs that match a specific Permission Category, simply select the Permission Category FIRST (before typing the doc name). Then, when you begin typing the doc name, docs matching your selected Permission Category will appear in a section at the top of the doc name list.



Learn more about Pre-setting Doc Permission Categories for Doc Names →

## Fully Manipulate Your PDF Docs in One Place with Ease

Need to break apart a doc, rearrange its pages, or rotate some or all of the pages? We've got you covered! The Break Apart/Arrange feature now allows you to do all of the above!

To start using the features, go to the same Break Apart page for any transaction doc or unassigned doc like you always have (by clicking the doc's gear icon, then Break Apart). Then:

- To break apart: No changes—you can still click the scissors in between pages to break the doc apart.
- To rotate a page: hover over the page and click the [v] icon.
- To rearrange: Click and drag a page to its desired new position.

While the system can manage rearranged pages after you start breaking apart and naming docs, we recommend rearranging the pages before you begin the break-apart process. This helps keep your workflow organized, making it easier to navigate through the process without confusion.

Learn more about Breaking Apart Docs →

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# August 24, 2024

## Default Value for Commission Summary Now Available to All Accounts

To help meet recent NAR Settlement requirements and simplify tracking compensation sources, all Pipeline accounts may now set a default value for the *Commission Summary* field. Once set, the default value will automatically populate in the *Commission Summary* field for each new transaction, prompting team members to enter Buying side sources.

Previously, this option was limited to Commission Module accounts.

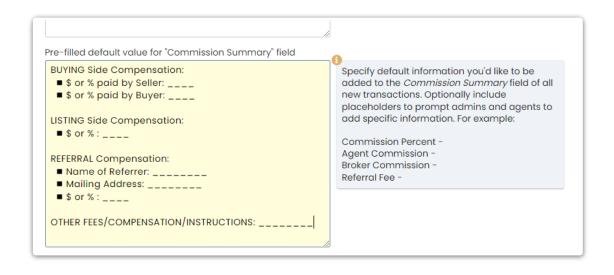
The *Commission Summary* field is commonly used to store and share compensation details with everyone who has access to the transaction. It allows agents to easily add any negotiated compensation figures or specifics, making them visible to admins for better transparency.

Here's how to set it up:

1 Go to Company Settings by clicking your name in the upper right corner, then [Admin / Settings].

2 Scroll to the Transaction Settings section and locate the Pre-filled default value for Commission Summary field.

3 Enter your desired default information and save to apply it to all new transactions.



#### **Commission Module**

#### Set a Default Value to Prompt Entry of Buying Side Sources

When managing commissions, you now have the option to distribute Buying Side commission between seller and buyer sources. As a result, the old commission fields have been renamed *Commission (Paid by Seller)*, so that the source is clear.

Buyer-sourced commission can be entered into a new, optional*Commission* (*Paid by Buyer*) field by clicking [+] next to the *Commission* field.

#### Learn more about Managing Commissions $\rightarrow$

Sale Price		•				
Listing Side			Buying Side			
Commission (paid by Seller)			Commission (paid by Seller)	H		
3% *	%	\$	2%	*	%	\$
			Commission (paid by Buyer)			
			1%	*	%	\$
Referral Commission			Referral Commission			
0% *	%	\$	0%	*	%	\$

#### Commission Disbursement Authorization is Now Compensation Disbursement Authorization

The term "Commission" has been replaced with "Compensation" throughout the CDA to clarify that it includes various sources of compensation.

You'll see this change in the document name as well as in the fields and labels within the form.

This update will help ensure consistent terminology and a clearer understanding of the complete compensation picture for each transaction.

Learn more about Commission Module →

# April 7, 2024

#### Enter Dual Buyers or Sellers Once and Forget It

When there are two buyers or two sellers on a transaction, you can enter them both directly on the *Add* or *Edit Transaction* page. Doing so will automatically add them as contacts on the transaction, saving you the time of entering their information in both places.

To add dual buyers or sellers, from the *Add* or *Edit Transaction* page, click [add buyer/seller contact(s)], then enter their information (address, email, phone, etc.) separated by the word *and*. When the transaction is saved, a new contact will automatically be added for each.

View the **i** tooltip below the Buyer / Seller fields for more details.

0.10 ~	Admin Info (only visible to adm	in staff)	]
3/26			
0,20	Include 123 Kuzdu Lane in A	pril's backup	Click to add 1 or 2 "Seller" contacts. Only NAME is required.
-/-	<ul> <li>Buyer, Seller, Pricing, etc.</li> </ul>	Hid	
	Seller Name *		information by "and" (e.g., John and Carrie
	Jim and Jane Zettelkasten		Smith). Keep information in the same order for
	add seller contact(s)	(	each field. If info is the same for both contacts, only enter once.
	Seller Address	Seller Email	
	123 Main Street	hollis+jsmith@paperlesspi	Example: Joe Rogers and Mary Hilton
	Seller Phone	Seller Fax / Other	2115 Myrtle Lane, Oakwood, IL 61800
	(555) 555-5555 and (555)		jrogers@realti.com and maryh@realti.com (217) 555-1212 and (217) 555-8833
	Buyer Name		
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	Sale Price		
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	Total Commission		
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# New Date Ranges Give You Instant Access to Transactions Within a Specific Number of Days

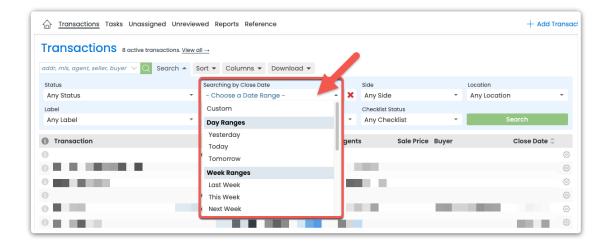
Four new relative date range options allow you to easily find transactions that are a certain

number of days from the current date:

- Yesterday
- Next 7 days
- Next 14 days
- Next 30 days

Combine your date searches with other search options to isolate the exact transactions you're looking for. And since these ranges are relative to when the search is being run, you can save them as custom shortcuts for speedy access later.

Learn more about Searching & Sorting Transactions →



## New Password Requirements Strengthen Your Account Security

We've updated our password requirements to adhere to the latest guidelines recommended by the National Institute of Standards and Technology (NIST). If your existing password doesn't meet the minimum requirements, you'll be prompted to create a new one the next time you log in.

Don't worry, we won't require you to concoct an arbitrary composition of numbers, symbols, uppercase/lowercase, etc. NIST has found that such strict requirements actually **do not** improve security. Ironically, they can do the opposite, leading people to create more uniform passwords to satisfy the criteria, making passwords easier to guess and harder to remember.

Learn more about Login Security  $\rightarrow$ 

#### **Commission Module**

#### Make the Important Parts of Your CDA Instructions Stand Out

The 1-click formatting tools you've been enjoying when drafting your messages, company announcements, and email signatures are now available on your *CDA Instructions*.

Use the standard formatting icons to easily format and instantly preview visually compelling instructions to the title company or other readers.

Emphasize important information by adding headers, bold or italic text, links, horizontal lines, and bulleted and numbered lists.

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\$20,720.70	CDA instructions (to be shown above Payapres)
Transaction Commission Summary	$A_{a} B I \leftrightarrow \mathfrak{O} \equiv \mathbf{i} \equiv$
Paperclip Realty charges the Flat Fee Commission for all transactions including unrepresented buyers. The only exception is unrepresented sellers. Admin Info	When this commission disbursement is signed, we authorize the total commission to be disbursed and delivered as indicated.
Here is some admin information.	CDA instructions (to be shown below Payables)
	Aa       B       I → ∞ ≔ i=         Wire funds to:       .         • Account #: 1001001234       .         • Routing #: 012345678       .
	Mail a copy of the closing paperwork to: Old Pine Realty 101 Main Street Anywhere, AS 123456
	Saving commissions will also generate a Commission Disbursement Authorization.

# February 4, 2024

#### Break Apart: Split and Name Docs While Zoomed In

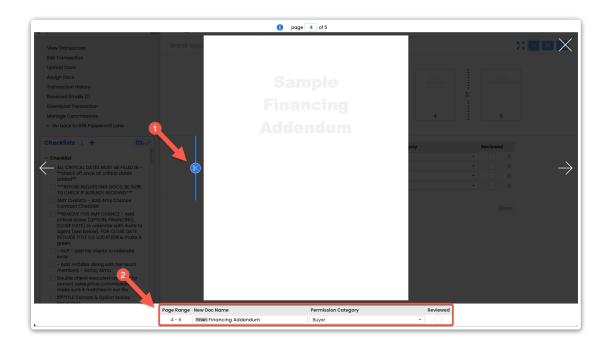
If you need to get a closer look at a doc as you're breaking it apart, you can now complete the entire process while zooming in on a single page.

You can now split, name, and assign permissions to your docs while you're navigating between full-sized pages. This allows you to specify your docs while taking a closer look at them vs. having to return to the grid view to split and name them, potentially disrupting your workflow.

Of course, this zoomed-in method simply serves as an added convenience when needed. You can

still break apart docs from the thumbnail grid to take advantage of the bird's eye view.

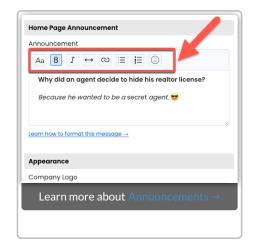
Watch a 2-minute video on how it works →



### Easier Formatting is Now Available in More Places

The formatting tools you've been enjoying in messages are now available in your email signature and company announcements. Create visually appealing signatures and announcements by adding bold text, links, lists, emojis, and more using the standard formatting icons.

Text S	Signature					•
Text Si	gnature			Fo	rmatting	tips
Aa	ВІ	⇔ © ≡				
		n Carey				
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	ntact me.	ty <u>View my listi</u>	ngs Lea	ive a revie	<u>ew</u>	



#### View Past and Future Commission Figures at a Glance

Need quick access to commission-related figures from three months ago or two months ahead? Access your *Commission Summary* across multiple months and years by clicking the forward and back arrows on the Commission Summary page.

Financials	Commissio	on Summai	ry					
Commission Summary	< Februar	y 2024	Januar	y 2024 🛛 🔪	< 2	024		2023
Listing Inventory Report	Listing	1	Listing	8	Listing	9	Listing	<u>0</u>
Pending Inventory Report	Commission	\$0.00	Commission	\$43,700.00	Commission	\$43,700.00	Commission	\$0.00
Comparative Production								
	Pending	<u>0</u>	Pending	<u>0</u>	Pending	<u>o</u>	Pending	15
Account Stats	Commission	\$0.00	Commission	\$0.00	Commission	\$0.00	Commission	\$34,490.00
Total Usage								
Usage by Agent	Closed	2	Closed	3	Closed	5	Closed	92
	Commission	\$48,000.00	Commission	\$57,000.00	Commission	\$105,000.00	Commission	\$373,139.00

Don't forget you can always access your comprehensiveComparative Production Report . It allows you to measure seasonal performance by comparing figures for any given month across multiple years, as well as annual totals.

### Preset Shortcuts Have Been Retired: Use Custom Shortcuts Instead

The six preset *Shortcuts* that previously resided on the left Transactions menu have been retired. Use your own *Custom Shortcuts* to create and quickly access any reports you regularly view.

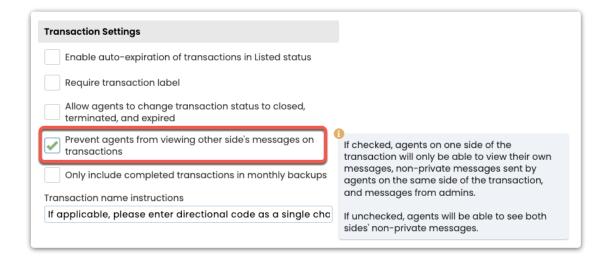
#### Learn more about Custom Shortcuts here $\rightarrow$

Search address, mls, agent, seller, i	buyer Q In Transactions Tasks Unassigned	d Unreviewed Reports Refe	rence	+ 4	dd Transaction ?	Help 🛞 Rob	pert
Add Transaction	Transactions 6 active transactions.	. <u>View all →</u>					
Import Transactions	addr, mls, agent, seller, buyer $ arsigma  \mathbb{Q} $ Search	✓ Sort ✓ Columns ✓ D	ownload 🗸				
<ul> <li>My Shortcuts</li> </ul>	Transaction	4	Status	Complete	Agents	Close Date 🌲	
🗘 Agent Tasks	🕕 芦 456 Jackson Ave.	L Conde	Listed		Robert Zimmer		
① For Review	🍈 芦 3 Romine Street, Phoenix, AZ 85001 (sc	amp L Single Family Residentia	Pending	14/18	Tammy Sheldo	Dec 08, 2023	Ę
☆ Updated Today	378 Blurry Lane	L Single Family Residentia	Pending	0/18	Tammy Sheldo	Dec 12, 2023	Ę
	192 Barton Lane	L+B Industric	Pending	6/10	Multi 🔗	Dec 27, 2023	
- Shortcuts	🕕 🌔 芦 5332 Rosewood Lane Apt 1, Dallas TX 7	76675 L+B Commercia	Pending	3/11	Multi 😤	Dec 07, 2023	
With Incomplete Checklists	183 Bark Street, Phoenix, AZ 85001	L Single Family Residentia	Pendina	18/18	Tammy Sheldo	Dec 07, 2023	Ę

#### Only Allow Agents to See Messages on their Side

Need for notes and messages sent by agents on one side of a dual-sided transaction to be shielded from agents on the other side?

Set your account to automatically hide these messages from the other side's agents by turning on *Prevent agents from viewing other side's messages* under Company Settings .



#### **Commission Module**

# Track Agents' Progress Toward Commission Splits or Measure Their Total Brokerage Contributions

With the new Agent Contribution report, you can view agents' commission contributions to the brokerage during a given time period, as well as monitor how close they are to their Next Commission Splits.

Download an Agent Contribution report from the Reports area by clicking [Agent Contribution] on the left menu and selecting your desired options for the report.

	A	В	С	D	E	F	G	н
1	Agent Contr	ibution			Report generated by Paperless	Pipeline for Hollis Holcomb on		
2	Kings Coast Real Estate	Current fiscal year			Feb. 5, 2024, 10:49 a.m. ET			
3								
4	Agent Name	Start Date	Fiscal Year	Commission to Brokerage	Transactions	Current Split	Next Split Threshold	Amount to Next Split
5	Amanda Holmes		2024-01-01	\$490.50	1			
6	Bobby Summers		2024-01-01	\$9,030.00	2			
7	Christy Dennis		2024-01-01	\$2,920.50	2	80		
8								
9	Totals			\$12,441.00	5			

# December 10, 2023

## Duplicate Transaction: The Time-saving Tool You Didn't Know You Needed

Say goodbye to repetitive manual transaction entries. Pipeline's new*Duplicate Transaction* option can streamline your team's workflow in unique and creative ways you won't be able to live without.

Here are a few examples of how duplicating transactions can save time every day:

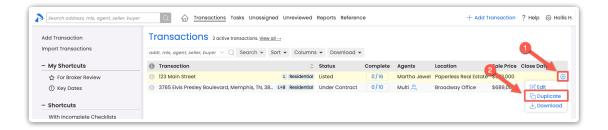
• **Transactions as Templates:** Create a transaction to be used as a template, containing whatever default information is appropriate for that template's scenario (e.g., *Transaction* 

*Name*: "Sunset Office Listing Template", or "Team Willow - Template"). Include as much or as little info, docs, contacts, checklists, etc. as needed. Whenever that template transaction gets duplicated, its info will automatically be copied over. Then any remaining, transaction-specific information can be added to the resulting transaction.

- **Copy Buyer Offer Transaction:** Duplicate an existing buyer's offer transaction when it falls through to effortlessly copy the transaction.
- **Support a Parcel of Properties:** Save time by duplicating transactions representing a parcel of several properties with nearly identical property information.

To duplicate a transaction: From the Transaction List , click the transaction's gear, then select [Duplicate].

#### Learn how to Duplicate A Transaction $\rightarrow$



You should not duplicate transactions when Listing-side transactions fall through. Instead, you should create a New Offer to copy only the relevant Listing info and link the subsequent transaction with the original. Learn more  $\rightarrow$ 

## Instantly Track a Transaction's Progress and Verify Activity

You can now quickly locate the exact actions that have occurred on a transaction, saving the time of having to browse potentially long transaction histories.

To find specific actions, click on [Transaction History] in the left menu of a transaction. Then, use the search filters at the top of the page. You can filter by the type of action, the user who performed it, and/or a date range.

Learn how to Search A Transaction's Activity History  $\rightarrow$ 

Search address, mis, agent, seller, bu	rer Q 🟠	Transact	tions Tasks Unassigned	d Unreviewed R	eports Refer	ence	+ Add Transaction	? Help	Hollis Hollis H
View Transaction	<b>N</b>	Act	ivity History fo	r 1234 Bur	ngee La	Ne 25 transaction a	ctivities		
Edit Transaction		Email d	ocs and notes to this transac	tion: <u>4568212-111443-</u>	TX-28163@docs	paperlesspipeline.com	. <u>A</u>		
Upload Docs		search	0	Search 🔺					
Assign Docs		Type		User		Date Range			
Transaction History			ct action type(s)	Select a User		start date 💾 end	date 💾	Search	
Received Emails (0)			11.57						
Download Transaction		туре	Description		Action	Updated By	Updated On		
Manage Commissions			Listing checklist (Resider	ntial)	Added	Hollis H.	Dec 8th		
← Go back to 1234 Bungee Lane		:=	Rental Listing		Deleted	Hollis H.	Dec 8th		
0		C	listing agreement		Reviewed	Hollis H.	Dec 8th		
Checklists : +	0% 🗸		Listing Date added: 2023	3-12-08	Added	Hollis H.	Dec 8th		
			Status changed to: Liste	d (was: Active (	Updated	Hollis H.	Dec 8th		
– Listing checklist (Residential)		<b>C</b>	Seller Name added: Jim	Crouch	Added	Hollis H.	Dec 8th		

## Save Time By Running Combined Searches in a Single Step

You can now access *Power Search* in the area where it has the most power, and save time in the meantime. *Power Search* has always been at your service in the upper left corner of each Pipeline page, with the resulting search criteria conveniently copied into Transactions – Advanced Search, where you can add additional search criteria, if desired.

But now your *Power Search* options can be accessed directly from Advanced Search, allowing you to *Power Search* and add any additional filters in a single step.

#### Learn more about Power Search →

ons 🔺	Transactions 1-50 of 170 active trans	actions. <u>View all →</u>						
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omplete	Any Status →	Choose a [	oate Type →		✓ Any Side →	<ul> <li>Any Location</li> </ul>	n →	*
Year	Label	Commissions			Checklist Status			
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Closings	1 Transaction	🗘 Status	Complete	Agents	Location	Sale Price	Close Date 💠	
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	icon font test 110323 Commerce	al Listed	0/16		Atlantic office 2			6
	1030 Post Release Drive L+B Resident	ial Listed	3/30	Multi 🔗	Atlantic office 2			6
	New Line?     Offi	ce Listed	0/19		Atlantic office 2			202
wed	124 Pipermill Rd L Commerce	al Listed	0 / 101	Kristian Admin	Atlantic office 2	\$610,720		£03
	1234 Burgess Lane L New Construction	on Listed	0/101	Agent Red	Atlantic office 2			6
ated View all	12345 Purser Lane Lea	se Listed	0/14		Atlantic office 2			6
	12345 Numeric Lane L+B New Construct	on Listed	0/14	Multi 🔗	Balfour Way2			6
ated View all	12345 Numeric Lane New Construction	on Listed	1/18		Bradley's Team			0
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	💿 🔵 🔳 12345 Numeric Lane 🛛 New Constructi	on Listed	0/14		Bradley's Team			6
	12345 Numeric Lane New Constructi	on Listed	0/14		Bradley's Team			0
	12345 Numeric Lane New Constructi	n Listed	0/14		Bradley's Team			ŝ
	123 Main Street (#2) - h L+B Commerce	ial Listed	2/21	Multi 🔗	Bradley's Team	the sale price is \$60,0	Feb 05, 2022	6
	Bob Smith Referral     L+B Ren	al Listed	1/13	Multi 🔗	Broadway and 11th offi	\$750	Feb 08, 2022	6
	Copy2 of 1501 S 7th St, Br L+B 4 Zap	er Listed	0/51	Multi 🔗	Old Pine	\$100.000		ê

#### Spot and Address Important Transactions Instantly with Custom Flags

Need to see which transactions were recently added? Which have recently received messages? Which are ready for a certain action? Avoid missing or overlooking transactions that are important to you by flagging them with your very own custom flags. <u>Transaction Flags</u> can be based

on any search criteria that can be defined in the *Transaction Search* area.

To create a custom flag from the Transaction List, run you desired search, then click [Save Search], choose a flag, name it, and save it.

That's it! Transactions matching that criteria will be flagged for you on the *Transactions List* going forward.

Learn more about Transaction Flags  $\rightarrow$ 

Search address, mls, agent, seller, l	ouyer Q 🟠 <u>Transactions</u> Tasks Unassigner						1 -0-	
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mport Transactions	addr, mls, agent, seller, buyer $ arsigma  {f Q} $ Search	n ▼ Sort ▼ C	Columns 👻 🛛	ownload 🗸				
- My Shortcuts	Transaction			Status	Complete	Agents	Close Date 🌲	
🗘 Agent Tasks	🕕 芦 456 Jackson Ave.		L Conde	Listed		Robert Zimmer		
① For Review	🕕 芦 3 Romine Street, Phoenix, AZ 85001 (se	amp L Single F	Family Residentia	Pending	14/18	Tammy Sheldo	Dec 08, 2023	
☆ Updated Today	378 Blurry Lane	L Single F	Family Residentia	Pending	0/18	Tammy Sheldo	Dec 12, 2023	
	192 Barton Lane		L+B Industria	Pending	6/10	Multi 🔗	Dec 27, 2023	
Shortcuts	🕕 🌔 芦 5332 Rosewood Lane Apt 1, Dallas TX	76675	L+B Commercia	Pending	3/11	Multi 😤	Dec 07, 2023	
With Incomplete Checklists	183 Bark Street, Phoenix, AZ 85001	L Single F	Family Residentia	Pendina	18/18	Tammy Sheldo	Dec 07, 2023	

## Automatic Doc Versioning Saves Your Team Typing

Pipeline will now allow docs with duplicate names to be added to transactions. Any duplicate doc name will have a version number appended to the end (e.g., Listing Agreement (2)).

agent, seller, buyer	合 Transactions Tasks Unassigned Unrevi	ewed Reports Reference		+ Add Transaction	? Help	Hollis
tion on	Upload docs to 1 Broadw Email docs and notes to this transaction: 5526-15024					
		Drag docs here or click to choose docs from your comp	uter +			
istory	File Name	Doc Name	Permission Category		Reviewed	
iiis (o) nsaction 1 Broadway 	listing agreement.pdf	L Eisting agreement Closing Package CLSTMT Closing Statement (Estimated) CLSTMT Closing Statement (Final) CLUE/Insurance Claims History Report FL - Addendum 1 MLS Input Sheet BVUA Buyer's Vacant Land Additional Inspection Advisory Mold Disclosure Seler's Disclosure Seler's Disclosure	Permission Category	•	Upload D	X
.isting - Before '78 -/-						

This new automatic versioning of docs does not impact the *Company Setting*; *Prevent duplicate document uploads*. That setting is unrelated to this feature and controls whether a doc can be added when the actual contents of the doc (vs. the doc name) are identical to an existing doc.

### See a Transaction's Agents at a Glance

You can now view the agent associated with a transaction directly from the *Transactions List* without hovering. When there is more than one agent on a transaction, "Multi" will be displayed, and you can continue to hover to view those agents.

Search address, mis, agent, seller, E	buyer Q In Transactions Tas	ks Unassigned U	Inreviewed Rep	orts Reference		+ Add T	ransaction	? Help {	3 Hollis
Add Transaction Import Transactions	Transactions 1-50 of 52 of	ctive transactions. <u>Vie</u>	w all →		1				
mport transactions	addr, mls, agent, seller, buyer $ arsines  \mathbb{Q}$	Search 👻 Sort 🗸	r Columns -	Download 👻				Next >	Last »
<ul> <li>My Shortcuts</li> </ul>	Transaction	÷	Status	Complete	Agents	Location	Sale Price	Close Date	¢.
() Emails This Year	5332 Rosewood Lane, Dallas TX 1	76 L Residential	Listed	4/116	Bobby Summers	Bluffington			
I Flagged for Admin	🕕 😑 937 East Newcastle Avenue	L Residential	Listed	20/42	Multi 😤	Kings Coast Real Estat	\$250,000		
🗍 Frank's Tasks	8675309 Jenny Ave	L Residential	Pending	0/34	Miriam Bernhard	Bluffington	\$150,000		
☆ Frank's Transactions	678 Miller Ave	L Residential	Pending	15/58	Ashley Winters	Bluffington	\$564,000	May 11, 202	3 (
☆ High Priority	245 Second Street	L Import	Pending	9/24	Ashley Winters	Bluffington	\$100,000	Apr 26, 202	23 @

## One-click Text Formatting: Make Important Parts of Your Messages Stand Out

Use standard formatting icons to format text within messages you send from Pipeline – no special markings/markdown needed. This new WYSIWYG (what you see is what you get) editor allows you to format your text with a single-click, and see what it looks like in real time.

Create visually appealing and engaging messages by adding headings, emphasizing important points with bold or italic text, turn text into links, inserting horizontal lines, and creating bulleted and numbered lists.

#### Learn how to Format A Message $\rightarrow$



## Personalize Your Emails with Agent Signatures (for Transaction Coordinators)

Transaction coordinators, you now have the super power of including the desired agent's signature in emails you send from Pipeline, providing recipients with a more personalized experience and appropriate contact information.

To start including agent signatures, turn on *Enable alternate signatures on my messages* from your Personal Profile .

Next, choose whose signature you want to include when creating a message on the transaction.

Learn how to Use Agent Signatures In Your Messages (for Transaction Coordinators) →

323 November Wo	ay, Orlando, I	FL 32805–1234 Added on Nov 8, 2022 by Hollis Holcomb Last updated just now by Hollis Holcomb
🗠 Note / Email 🔗 Add Contact	🛛 Send to DocuSign	🗄 Merge Docs 🗍 Upload Docs 🔓
Email this message to:		
Listing agents	Buying agents	Staff (9)
Elijah McCoy	Herman Munster	Hollis Holcomb       Kyn Holco         Monta Test It Fleming       Professor Plum (Agent)         Rachel McWhirter       Rajesh Dhawan         Ramu Tremblay       Release Person         Roger Klotz       Release Person
Send to an external email address ( seller@paperlesspipeline.com		+ bcc
Subject 🕕 Your Timeline		Add autofill tag - Message Templates Choose a saved message template -
Message Audio Message Aa B I ↔ ∞ ≔ I=	Preview message	Add autofill tag
Your Timeline for {{transaction r {{key dates}}	iame}}	
		Autofill tag help + Formatting tip:
Options Make this note private (in Notes Send me a BCC (blind copy) of t Save this message as a reusable	he message	Append incomplete tasks to message         Append completed tasks to message         Append overdue tasks to message
Include my signature Include my signature Include Listing agent signature Include Buying agent signature No signature		Send Email 🗸 🗸

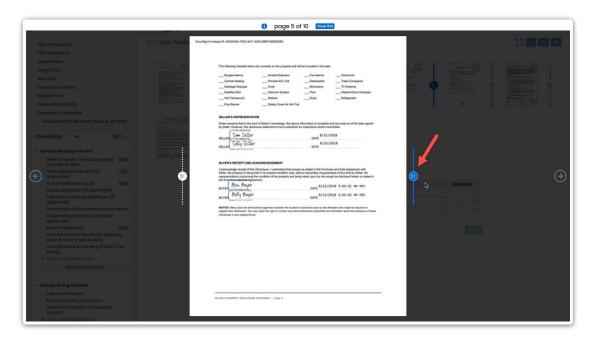
# October 29, 2023

## Break Docs Apart Faster By Pointing And Clicking

Extracting pages and breaking large docs into smaller docs is now faster, easier, and more intuitive. Preview the doc's pages in thumbnail or enlarged form, then click the scissors in between the desired pages to indicate your breaks. Dive in without a learning curve by watching this 2-minute video →

Learn more about Breaking Apart Docs  $\rightarrow$ 

Split: Doc Package		/				x کر x د x 2x 3
				X 5	in and in the second se	
	Workson 8 sectors and the first of the first					
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Need To Adjust What's Displayed On Your Coversheet? We've Got You "Covered"  $\textcircled{\sc opt}$ 

Customize the information that appears on your company's coversheet by selecting from multiple pre-set layouts. Within your selected layout, you can also control which sections appear and which do not by selecting them individually.

Master admins can visit Company Settings to customize your office's coversheet right away.

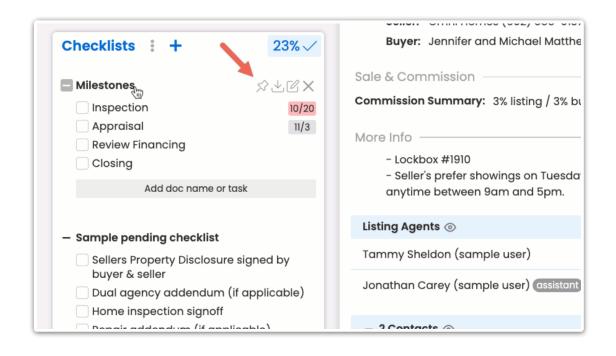
Learn more about Customizing Coversheets →

Transaction Coversheet Layou	t		
Select the layout that best mee	ts your office's needs:		
Info / Details		•	
Choose which fields should be i coversheet layout:	included in the selected		
	Optional Fields		<ul> <li>Total Commission</li> <li>Commission Summary</li> </ul>
More Info	<ul> <li>Custom Date Fields</li> </ul>		
Key Dates	Custom List Fields		
Contacts List	Custom Text Fields		
Contingency Dates			
Feature Settings			
Require two-factor authen	tication		
Enable Reviewed Docs fund	ctionality		
Enable Entered Docs featur	e		
Englis New Offer feature			

Old Pine Rea	alty			Phone: 555-555-5	treet, Wichita, KS 672
Coversheet fo	or: 123 Main S	treet			
Status:	Listed		Label:	Residential	
Side:	Listing		List Price:	\$575,000	
MLS #:	123123123 / ZA.3213		Expires On:	August 20, 2024	4
Listed On:	July 20, 2023		Lockbox Code:	12-34-56-78	
Accepted On:	September 29, 2023		Year Built:	2004	
Additional Info	D				
In-house TC:	Meg	Entry Instructions:		Gate Code: AX-	EF-GZ
City:	Cordova		Important:	Seller is on vaca	ation until 10/21.
More Info:	Lead- Mar Gift Package- B Electric- State Electric Water- County Water Garbage- Green Servi				
Sale Info Sale Price:	\$573,000		Home Warranty:	Paid by Seller	
Listing Contac	ts				
				Phone	Fax / Other
Name		Email bollistis@paperlesspipel	line com	555 555 5555	553 909 5949
Name Seller Jane Smith Listing Agent Marth	a Jewel	hollis+js@paperlesspipel		555-555-5555 509-791-2626	553-808-5848 743-611-4808
Seller Jane Smith		hollis+js@paperlesspipel			
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Seller Jane Smith Listing Agent Marth Buying Contact Name Buyer River Rushin 793 Jackson Avenue Outside/Co-op John	g Burgre / Bloom Realty	hollis+js@paperlesspipel hollis+mj@paperlesspipe Email river@paperlesspipeline.	eline.com	509-791-2626 Phone 689-918-8133	743-611-4808 Fax / Other
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Selier Jane Smith Listing Agent Marth Buying Contac Name Buyer River Rushin 793 Jackson Avenue Outside/Co-op John Key Dates & M 	Burgre / Bloom Realty Bliestones Agency Disclosure Listing Agreement Purchase Agreement	hollis+js@paperlesspipel hollis+mj@paperlesspipe Email river@paperlesspipeline.	eline.com	509-791-2626 Phone 689-918-8133	743-611-4808 Fax / Other
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Seller Jane Smith Listing Agent Marth Buying Contac Name Buyer River Rushin 793 Jackson Avenue Outside/Co-op John Key Dates & M 	sts g g Burgre / Bloom Realty lilestones Agency Disclosure Listing Agreement Purchase Agreement Cother Dates Oct 13, 2023 Oct 26, 2023	hollis+js@paperlesspipel hollis+mj@paperlesspipe Email river@paperlesspipeline. john@paperlesspipeline.	com com com Option Period End: Earnest Money Due:	509-791-2626 Phone 689-918-8133 630-708-8251 630-708-8251 000000000000000000000000000000000000	743-611-4808 Fax / Other
Seller Jane Smith Listing Agent) Marth Buying Contac Name Cuyer River Rushin 793 Jackson Avenue (outside/Co-op) John Key Dates & N  7/17/23 9/29/23 Contingency & Inspection Due: Loan Approval Due: Appraisal Due: Contacts Name	tts g g Burgre / Bloom Realty Hilestones Agency Disclosure Listing Agreement Purchase Agreement C Other Dates Oct 13, 2023 Oct 26, 2023 Oct 18, 2023	hollis+js@paperlesspipel hollis+mj@paperlesspipel river@paperlesspipeline. john@paperlesspipeline.d	com com com Option Period End: Earnest Money Due: Photography Shoot:	509-791-2626 Phone 689-918-8133 630-708-8251 630-708-8251 0000000000000000000000000000000000	743-611-4808 Fax / Other 970-999-1801  Fax / Other
Seller Jane Smith Listing Agent Marth Buying Contact Name Buyer River Rushin 793 Jackson Avenue Outside/Co-op John Key Dates & M  7/17/23 9/29/23 Contingency & inspection Due: Loan Approval Due: Appralsal Due: Contacts	tts g g Burgre / Bloom Realty Hilestones Agency Disclosure Listing Agreement Purchase Agreement C Other Dates Oct 13, 2023 Oct 26, 2023 Oct 18, 2023	hollis+js@paperlesspipel hollis+mj@paperlesspipe <b>Email</b> river@paperlesspipeline. john@paperlesspipeline.	com com com Option Period End: Earnest Money Due: Photography Shoot:	509-791-2626 Phone 689-918-8133 630-708-8251 630-708-8251 0000 0000 0000 0000 000000 0000 0000 0000 0000 0000000 000000 00000000	743-611-4808 Fax / Other 970-999-1801
Seller Jane Smith Listing Agent) Marth Buying Contact Name Outside/Co-op John Key Dates & M  7/17/23 9/29/23 Contingency & Inspection Due: Loan Approval Due: Appraisal Due: Contacts Name Escrow Kenan Migh	ts substantiation s	hollis+js@paperlesspipel hollis+mj@paperlesspipel river@paperlesspipeline. john@paperlesspipeline.d	aline.com	509-791-2626 Phone 689-918-8133 630-708-8251 630-708-8251 0000000000000000000000000000000000	743-611-4808 Fax / Other 970-999-1801  Fax / Other

# Keep Your Most Important Checklists Front And Center

Need a particular checklist to stick to the top of a transaction? Admins can pin such checklists to the top of the Checklists section by hovering over the desired checklist on the transaction, then clicking the pin. Pinned checklists will appear at the top of the Checklists section for anyone who views the transactions.



#### Learn more about Pinning Checklists on Transactions →

#### Make Your Signatures More Personal

You can now add an image to your personal signature that appears at the bottom of messages you send from Pipeline. Whether you prefer your image to be a company logo, a photo of yourself, or an image of your standard email signature, the choice is yours! Images can also be coupled with any custom text you enter (including links), supporting more consistent branding across all your Pipeline and non-Pipeline messaging.

Learn more about Customizing Your Email Signature →



# Put Your Calculators Away! Calc Pro-rated Splits With A Few Clicks When Agents Meet Their Split Threshold

When an agent is close to hitting their commission split threshold on a transaction, the system will help you calculate the pro-rated commission due for that transaction. To calculate:

- Click [Calc pro-rated splits]
- Enter the NEW split percentage
- Review the calculations and click [Update Commissions]
- Optionally: update the agent's profile with their new split information, when asked.

Learn more about Calculating An Agent's Pro-Rated Commission Amount  $\rightarrow$ 

	Calculated Commission Amou	unts		Listina	This transaction's commission may push the agen commission split threshold.	t over their ne
	Gross Commission:			\$25,920.00	Jim Greene - YTD figures (Jan. 1, 2023 to Oct. 25, 202	:3)
Total Commission	Distributable Commission	(Oracle Deferrel)		\$25,920.00	Agent performance	
25,920.00	Distributable Commission	(Gross - Referral):		\$25,920.00	Closed transactions:	
	Next, we will help you distr	ibute the broker/agen	t commission of \$25.9	20.00.	Closed listings:	
ead Source	•				Closed sales:	
uyer: Organic Search eller: Friends & Family				Edit Prev Step	Units:	
siler. Friends & Farmiy					Sales volume:	\$5,345,343
dmin Info	Broker / Agent Commissio	n Disbursement			Commission split threshold info	
ome default					Agent's current split:	
dmin fo	Distribute Listing Commissio	n:		\$25,920.00	Commission to brokerage before this	
0					transaction:	\$2,799
	<ol> <li>Allocate sales volume and</li> </ol>	units			Next commission split threshold:	\$5,000
			Sales Volume	Unit	Commission totals before this transaction	
	Jim Greene		\$864,000	1	Commission produced before agent/broker split	\$12,593
					Agent gross commission:	\$9,793
	<ol> <li>Specify agent / brokerage</li> </ol>	splits			Agent net commission:	\$8,150
		Brokerage	Agent		Agent gross in-house referral commission:	\$C
	<ol> <li>Jim Greene</li> </ol>	30%		* % \$	Fees paid to brokerage	
				calc pro-rated splits	Administrative fee (SP):	\$1,069
					Advertising Fee (AG):	\$14
			Calcu	late & Continue	Commission Deferral (DC):	\$2

1			E & O:	\$13.00
	Fees & Deductions		Rental Commission (GC):	\$73.04
			Test Fee 12:	\$1.00
			Transaction Fee:	\$220.00
	Deductions Broker's Fees & Deductions		Update commission split for Jim Greene $\rightarrow$	
		¢		

		407 677	
ss Commission:		\$25,920	.00
ributable Commission (		<b>*</b> 05 000	00
lext, we will help you distri	Calc Pro-Rated Splits		
	Agent's distributable commission:	\$25,920.00	5
	Commissions to brokerage before this transaction:	\$2,799.44	Ρ
er / Agent Commissio	Next commission split threshold:	\$5,000.00	
	Remaining commission to next split threshold:	\$2,200.56	
tribute Listing Commissior	Current agent commission % (from user proflie):	70%	0
choute Listing commission	Distributable toward current split (70%):	\$7,335.20	
llocate sales volume and i	Distributable toward new split:	\$18,584.80	
	Next agent commission split %:	%	
n Greene	Broker commission for this transaction:		
pecify agent / brokerage s	Agent commission at old split:		
, ,	Agent commission at new split:		
m Greene	Total agent commission for this transaction:		
	Cancel Update Com	missions	ts
	Calcula	ite & Continu	Je

# September 10, 2023

## Get Signed DocuSign docs into Pipeline without lifting a finger

Docs you send for DocuSign signature from Pipeline will now be automatically imported back into Pipeline once they've been fully executed...no upload needed! Once docs are fully executed, they'll automatically arrive in Unassigned Docs where they can be assigned via the same easy workflow you're already used to. You'll continue to receive an email notification that signing has been completed, and you'll also now receive a notification on your Pipeline Home page whenever you log in.

Learn more about Receiving Signed Docs Automatically via DocuSign  $\rightarrow$ 

Unassigned Docs 36 docs. Email docs to your Unassigned Docs page: <u>123821</u> ; <u>x@docs.paperlesspipeline.com</u>	<u>2-999443-</u>
Bulk  Search docs  Q Search	✓ Sort ✓ Columns ✓
1 Unassigned Doc Name ≑	Email Subject or So 💠 Location 🚔
Please_DocuSign:_Agreement	Imported from DocuSign Austin

### Send Reference Docs from Transactions in one step

Save time and steps by sending*Reference* forms and docs directly from transactions. Start the process by visiting the Reference page, selecting the doc you'd like to send, then specifying from which transaction you'd like the doc to be sent. Docs sent in that manner will have that activity tracked in the Notes & Sent Emails section of the transaction, as well as the Transaction's history.

Learn more about Sending Reference Docs & Links from a Transaction →

Search address, mis, agent, seller, buye	r 🔾 🏠 Transactions Tasks Unassigned <u>Reference</u>		
	Reference Docs & Links Forms, disclosures, and listing present nons available to the entire Q Search Email Docs	e company.	
	• + Awards & Recognition (2 docs)	Added By	Added On
	+ Company Images (2 docs)	Added By	Added On
	- Contract Forms (5 docs)     Listing Contract	<ul><li>Added By</li><li>Hollis H.</li></ul>	Added On Aug 5, 2021

Message
Hi M,
I've attached the required docs.
Please review them as you have the time.
Thanks :)
Hollis
Send me a CC (blind copy) of the email
Send days from a transaction
Choose a transaction to send docs from:
18 park
18 Park Street, Phoenix, AZ 85001 (sample)
Attended Docs.
Check the yellow boxes below for docs you want to email.

# Automatically communicate important doc updates when sending task reminders

When a task is directly related to a doc, any comment made on that doc will automatically be included when the task is sent in a message. Whether dragging a task into the message field, appending tasks to a message, or a task is automatically included in a daily task reminder email, including the related doc comments will help your team conveniently identify the state of the doc.

Checklists : +	88% 🗸	🔵 240 Green Hill	Street Added on Mar 2, 2023 by Hollis Holcom	ib nb		211 Days on market
Listing Docs     IRPTA     Seller's Disclosure Notice     ✓ Show completed tasks →	2/16 2/11	Seller & Buyer				
Add doc name or task		List Price: \$400,000				
+ Listing Tasks		Listing Agents 💿				
		Mark Dean (inactive)	hollis+mark@paperlesspipeli	ne.com	732-993-0398	
		🖂 Note / Email 🔗 Add Contact	🗄 🖓 Merge Docs 🔿 Upload Docs			Q Search Docs
		Email this message to:				
		Staff (4)				
		Brandon Winters	Hollis Holcomb			
		Kyndall Holcomb	Miriam Benjamin			
		Send to an external email address	0			
		Enter email addresses				+ bcc
		Subject 🚯		Add autofill tag -	Message Templates	
		Your Incomplete Tasks			Choose a saved message template	Ŧ
		Message Audio Message				Add autofill tag 🕶
		Hi,				
		If the following tasks need to be	updated, please do so.			
		If the following tasks are comple	ete, piease check them off.			
					Autofiii tag	help Formatting tips
		Options				
		Make this note private (in Note		Append incomplete		

Example 1: Append tasks to an email

	sks - 🔴 240 Green Hill Street 🔉 🗈 🖻		Ę
240 Green Hill Street to hollis+prod			☆ ←
	To respond, reply to all.		
	Hollis Holcomb sent you a note about 🔵 240 Green Hill Street (Listing) (Resi	dential):	
	Your Incomplete Tasks		
	Hi,		
	If the following tasks need to be updated, please do so.		
	If the following tasks are complete, please check them off.		
	Hollis Holcomb <i>Transaction Manager</i> Kings Coast Real Estate		
	Incomplete Tasks in 🛑 240 Green Hill Street		
	Listing Docs:		
	FIRPTA	Thu, Feb 16	
	FIRPTA Q Missing Signature ( <i>FIRPTA</i> ) Seller's Disclosure Notice	Thu, Feb 16 Sat, Feb 11	

#### Example 2: Drag Tasks to Message

h address, mis, agent, seller, buyer	٩	لَيْ Transactions Tasks Unassigned Unreviewed Reports Reference + ۸	Add Transaction ? Help ③ Ho
Received Emails (0) Download Transaction		240 Green Hill Street     Added on Mar 2, 1023 by Hollis Holcomb     Last updated 11 minutes ago by Hollis Holcomb	211 Days on market
Checklists : +	88% 🗸	Side: Listing Location: Kings Coast Real Estate	
Listing Docs     FIRPTA     Seller's Disclosure Notice     Show completed tasks →	2/16 2/11	Seller & Buyer	
Add doc name or task		List Price: \$400,000	
+ Listing Tasks		Listing Agents 💿	
h		Mark Dean (inactive)	
		🗹 Note / Email 🙏 Add Contact 🖇 Merge Docs 🖒 Upload Docs 🔓	Q Search Docs
		Email this message to:	
		Staff (4)	
		Brandon Winters         Image: Winters           Kyndall Holcomb         Miriam Benjamin	
		Send to an external email address ()	
		Enter email addresses	+ boo
		Subject ① Add autofill tag + Message Templates	
		Enter subject Choose a saved message	template •
		Message Audio Message	Add autofill tag +
		Typa your masooga hara	
			Autofill tag help Formatting tips
		Options	
		Make this note private (in Notes & Sent Emails below) Append incomplete tasks to message	
		Send me a BCC (blind copy) of the message Append completed tasks to message	

#### Enter buyers and sellers in one place

Entering the buyer and seller information directly into the transaction input page will now automatically create a contact on the transaction, saving you the time of having to enter the person's information in both places.

To add a buyer or seller, from the Add or Edit Transaction page, click [add seller / buyer as contact], then enter their information (address, email, phone, etc.). When the transaction is saved, a new contact will automatically be created based on the information you entered.

Learn more about Adding Buyers & Sellers →

Q ☆	Transactions Tasks Unassigr	ned Unreviewed Reports Re	ference
	More Info		1
	Admin Info (only visible to adr	min staff) Street in September's backup	1
	– Buyer, Seller, Pricing, etc.	ŀ	lide
	Seller Name *	Seller Lead Source	
	Leticia Moore	- Select Lead Source -	•
	add seller as contact Seller Address	Seller Email	_
	Seller Phone	Seller Fax / Other	
	Buyer Name	Buyer Lead Source	
		- Select Lead Source -	•
	add buyer as contact		
	List Price \$400,000		
	Sale Price		
	\$		

# Save time by viewing images with a single click

If your office allows images to be uploaded to your account, you no longer have to download them to view them. To quickly view an image doc from any doc list, click the doc name, then [Open doc].

	Added on Mar 2, 2023 by Hollis Holcomb		214 Days o	
	Added on Mar 2, 2023 by Hollis Holcomb Last updated just now by Hollis Holcomb		market	
More Info Example				
+ Financial Info download				- 1
Listing Agents 💿				
Admin 1 One	hollis+adminone@paperlesspipeline.com	555-555-5555		
🖂 Note / Email 🛛 🐣 Add Contact	🔊 Send to DocuSign 🛛 🗄 Merge Docs 🔶 Upload [	Docs	Q Search	Docs
1 Label Document Name 🗘		Added	viewed 🗘 🛛 Entered 🗘	
- Financial Docs - visible to backoffice	admins			
Commission Disbursement Author		Aug 31, 2023		©
Buyer Docs – visible to buying agents     Buyer Broker Agreement	on this transaction and office staff	Just now		<u>.</u>
Buyer bloker Agreement	i Buyer Broker Agreement	Just now		<b>? X</b>
		samp		
	DU			
	A			

#### Final Commission Summary Notes are preserved to ensure accuracy

Once commissions have been managed and finalized on a transaction, the *Commission Summary* can no longer be edited by agents. This helps preserve the state of those notes at the time commissions were run to ensure their accuracy.

Learn more about transaction fields that cannot be updated by agents  $\rightarrow$ 

## Assign accurate Financing Types

You asked for more Financing Type options and now they're yours.

The optional *Financing Type* field helps your team cleanly keep track of each deal's financing method. Master admins can visit Company Settings to turn the field on, if needed.

Assigned Age	nts	
Listing	Buying	Agent
		Jim Smith
		Alice Parker

Notice that the old "FHA/VA" option has been split into two separate items. If you need to update any of your transactions from "FHA/VA" to one of the separated options, click here  $\rightarrow$  then update as needed.

#### Easily track and access co-op agent phone numbers

You can now conveniently store co-op agents' phone numbers along with their other information on transactions. Add an agent's phone number while creating or editing transactions, and it will be viewable along with the agent's other info on transactions.

Learn more about Adding Co-op Agents  $\rightarrow$ 

This transaction	n has outside (co-op) agents
	Outside Listing Agent
Name / Info:	Jim Dandy / Rad Real Estate
Email:	jim@paperlesspipeline.com
Phone:	(555) 555-5555
	Outside Buying Agent
Name / Info:	
Email:	
Phone:	

# Definitively indicate when there is no Home Warranty OR that an agent is responsible

Two new *Home Warranty* options allow you to more accurately report home warranty responsibility.

- None: Select "None" to communicate that the field has been completed, but that a home warranty will not be included.
- Agent: Select "Agent" to indicate agent responsibility.

Other Information		
Year Built	Home Warranty Select an Option	Select the home warranty payer. Leave blank if
Lockbox Code	Paid by Seller Paid by Buyer Paid by Agent	no home warranty.
Transaction Coordinator	None	
Select an Option 🔹		-
Sellers Disclosure Due	Financing Status Select an Option	
Custom Date Field	Custom List Field	
Ë	Select an Option	
Compliance Deadline		
More Info		
**MORE INFO FOR OREGON:**	•	
EM Amount: Home Warranty: EM Received (Y/N): Prelim Received (V/N):		

# June 25, 2023

Easily track custom information important to your team with optional pre-set and custom fields

#### **Optional Pre-set Fields**

From Company Settings, click to turn on any of the following fields your office needs to track on transactions.

- Earnest Money Amount
- Lockbox Code
- Home Warranty
- Year Built
- Financing Type

#### **Custom Fields**

Master admins can now add up to 10*Custom Fields* to help their team track custom information that doesn't already have a field on transactions. From dates to lists to text fields, use these new fields to cleanly gather and track information that helps your team drive transactions to completion. Any custom date-type field can optionally be set as a *Trigger Date* to allow *Task Due* 

Dates and Scheduled Messages to be triggered relative to that date.

*Custom Fields* will appear in all places that regular transaction fields appear, including on *Coversheets*, as *Autofill Tags*, and in downloads. They'll also be searchable in either the *Transaction Date Range Search* or *Global Search* areas.

Master admins can create new *Custom Fields* by going to Admin / Settings , then clicking [Custom Fields] from the left menu.

Learn more about Custom Fields →

Search address, mls, agent, seli	er, buyer 🛛 🟠 Transactions Task	ks Unassigned Unreviewed Reports Reference	+ Add Transaction ? Help 🛞 Holl
People	Custom Fields		
Manage Locations Manage Users Manage Contacts	will be activated on transactions,	raccount. Custom fields added to this page X where data for those fields can be tracked. "trigger date" to allow task due dates and red relative to that date.	
Manage Contact Roles	Custom field best practices:		
Customize	10	her necessary and useful information. 1g your office's standard terminology.	
Company Settings	, ,	l another field, create a fresh new one.	
Transaction Statuses	Plan carefully: Once data is gathe	ered for a field, deleting it will delete all its data.	
Transaction Labels	Create a New Custom Field	(mm: 10)	
Document Labels	Field Type	Field Name	
Document Names	Date Field	Disclosure Due	
Lead Sources			
Custom Fields	Add as Trigger Date 🚯	Add Custom Field	
Templates	Name	Туре	Trigger Date
Business Holidays	Transaction Coordinator	List	
Checklists	Contingency Removal	Date	✓ ■ Ø
Break Apart Docs	Agent Notes	Text	
Financials	Deposit Due Date	Date	

## Keep Contact Roles on transactions accurate and up to date

Keeping a clean list of suggested *Contact Roles* helps your team quickly and accurately categorize *Contacts* they add to transactions. The *Manage Contact Roles* page allows master admins to update or hide inaccurate *Roles* to clean them up on existing transactions and prevent them from being suggested in the future.

#### Learn how to Manage Contact Roles $\rightarrow$

Search address, mls, agent, seller, buy	rer Q 🟠 Transactions Tasks Und	assigned	Unreviewed Reports Ref	erence	+	? Help 🔅	3 Hollis H.
- People Manage Locations Manage Users Manage Contacts <u>Manage Contact Roles</u>	Manage Contact RC Contacts and the Roles assigned to transaction. This list allows you to update a Role or- hide (remove) it from the sugge when adding Contacts to transaction Bulk  Q Search Roles	them exist across all i sted Conta	ts contacts on all transact				
- Customize	esc		Search				
Company Settings	Escrow	(27)					
Transaction Statuses	Escrow Agent	6	Occurrences 🕕	Last Added			
Transaction Labels	Escrow Company	6	27	Feb 18, 2023			r C
Document Labels	Escrow Officer	5	<u>6</u>	Jan 26, 2023			r C
Document Names	Escrow Company		<u>6</u>	Apr 18, 2023			R C
Lead Sources	Escrow Officer		<u>5</u>	Jan 19, 2022			Q 🛛
Custom Fields							

#### Keyboard Hot Keys updated

If you're not using keyboard hot keys to perform frequent actions in Pipeline, you should give them a try! Using hot keys allows you to quickly navigate to the areas in Pipeline you access frequently. A few of the key-combinations for hot keys have been updated, so take a moment to review the updates or learn new ones you didn't know about.

Learn more about Keyboard Shortcuts →

# 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.

•	er, buyer Q 🟠 Trans		signed Unreviewed Reports Reference	,		1.100	Transaction	: noip	
- People Manage Locations Manage Users Manage Contacts	a contact across all its Contacts dropdown me	transactions -or- hide enu (displayed when a n this page or click a tra	ction. This list allows you to update (remove) it from the suggested dding Contacts to transactions). ansaction count to visit the						
- Customize	Q Search Contacts								
Company Settings Transaction Statuses	george		Search						
Transaction Labels	Name		Transactio	ons	Last	Added			
Document Labels	George Jetson		8		Jan 2	5, 2023			(
Document Names	Role	Company	Email	Phone	Other	Transactions	Last Added		•
Lead Sources	Outside Listing Agent	Jetson Homes	hollis+george@paperlesspipeline.com	555-555-5555		7	Jan 25, 2023		
- Templates	Escrow Agent	Jetsons / 123 Second	hollis+gj@paperlesspipeline.com	555-555-5555	1223123123	2	Oct 7, 2022	R C	
Business Holidays								_	
Checklists Break Apart Docs	George Leonardo		1		Apr 18	3, 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 →

Search address, mis, agent, seller, buyer	Q 🔂 Transe	actions Tasks Unass	signed Unreviewed Reports Referen	ce		+ Add	Transaction	? Help	Hollis H.
- People Manage Locations Manage Users Manage Contacts	a contact across all its t Contacts dropdown me	ransactions -or- hide nu (displayed when a this page or click a tr	ction. This list allows you to update (remove) it from the suggested dding Contacts to transactions). ansaction count to visit the						
- Customize Company Settings Transaction Statuses	Q Search Contacts george		Search						
Transaction Labels	Name		Transac	ions	Last	Added			
Document Labels	George Jetson		9		Jan 2	25, 2023			8
Document Names Lead Sources	Role Outside Agent	<b>Company</b> Jetson Homes	Email hollis+george@paperlesspipeline.com	Phone	Other	Transactions	Last Added Jan 25, 2023		
- Templates Business Holidays	Escrow Agent Outside Listing Agent	Jetsons / 123 Second Jetson Homes	hollis+gj@paperlesspipeline.com hollis+george@paperlesspipeline.com	555-555-5555 555-555-5555	1223123123	2 1	Oct 7, 2022 Sep 16, 2021	Q C Q C	
Checklists Break Apart Docs	<u>George Leonardo</u>		1		Apr 1	8, 2023			R

# Start updating with just a click

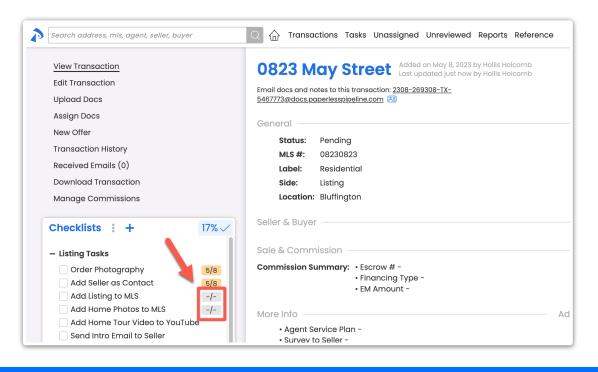
Just a friendly reminder (here and on hover of the Edit Transaction link) that you can get to the Edit Transaction page mouse-free by clicking **Ctrl+Shift+E** while viewing the transaction you'd like to edit.

Search address, mis, agent, seller, buyer	C      Transactions Tasks Unassigned Unreviewed Reports Reference     O823 May Street     Added on May 8, 2023 by Hollis Holcomb     Last updated 10 minutes ago by Hollis Holcomb
Edit Transaction Keyboard shortcut for edi	t:
[ctrl + shift + e]	Email docs and notes to this transaction: <u>2308-269308-TX-</u>
Upload Docs	<u>5467773@docs.paperlesspipeline.com</u>
Assign Docs	General
New Offer	Status: Pending
Transaction History	MLS #: 08230823
Received Emails (0)	Label: Residential
Download Transaction	Side: Listing
Manage Commissions	Location: Bluffington
Checklists : + 0%	Seller & Buyer
— Listing Tasks	Sale & Commission
Post Yard Sign @holcomb 5/1	Commission Summary: • Escrow # -
Send Intro Email to Seller 5/1	• Financing Type -
@transaction manager	• EM Amount -
Add Listing to MLS @agent 5/1	More Info
Order Photography @agent 5/8	• Agent Service Plan -
Add Seller as Contact @agent 5/8	• Survey to Seller -

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.



# April 2, 2023

### Message template scheduling

Save time and avoid oversights by auto-generating custom scheduled messages when transaction milestones are met.

You no longer need to track when messages need to be sent based on activity on a transaction. The system will now do that for you.

You can now set your *Message Templates* to automatically generate scheduled messages whenever the criteria you specify is met on a transaction. Trigger messages based on transaction dates being met or checklists tasks being completed. Once the milestone you specify has been met on a transaction, you'll be notified via email that a message has been generated for that transaction, and that it's waiting for you to review and send in your *Scheduled Messages* queue.

Learn how to Schedule Messages Using Message Templates →

h address, mis, agent, seller, buyer	Transactions Tasks Unassigned Un	reviewed keports kererence		+ Add Transaction	? Help	5
Personal Profile	Message Templates					
Your Commissions	Create message templates so you can reuse	commonly sent emails.				
Message Templates	Add Message Template					
Manage Templates	Template	Subject	Added On	Scheduled Shared		
Scheduled Messages	Formatting		October 7, 2021 at 9:24 p.m.	✓ ③		
Integrations	Intro to Seller	Congrats, {{contacts:seller:first name}}!	March 2, 2023 at 2:28 p.m.	✓		
	Template Name					
Zapier Dropbox Sign	Intro to Seller					
DocuSign	Email Subject  Congrats, {{contacts:seller:first name}}!			Add autofill tag 👻		
boasign				Add autofill tag -		
Your Info	Email Body Hi {{contacts:seller:first name}},			Add dutonii tag *		
Hollis Holcomb hollis+prod@paperlesspipeline.com		r listed with Paperless Real Estate on {{listing o	date}}. We look forward to taking this j	journey with you.		
Transaction Manager	If you have any questions along the way,	please don't hesitate to contact your friends o	at Paperless Real Estate.			
				Autofill tag help Formatting tips		
Your Permissions	Share Template					
Master Admin (account-wide, unlimited access ())	Share With Everyone	•				
Legal Stuff	Schedule Template			Cancel Save Template		
Terms of Service	L New Admin: Message 1	Welcome to our Paperless team!	December 23, 2021 at 7:58 p.m.	0		
Privacy Policy	New Agent: Message 1	Welcome to our Paperless team!	October 15, 2021 at 9:25 a.m.	0		
Billing Policy	Transaction Report (Buying Side)	{{today}} Update: {{transaction name}} - {{	January 23, 2022 at 3:14 p.m.	0		

Message Templates Create message templates so you can re	euse commonly sent emails.		
Add Message Template			
Template	Subject	Added On	Scheduled Shared
ormatting		October 7, 2021 at 9:24 p.m.	√ {
ntro to Seller	Congrats, {{contacts:seller:first nam	e}}! March 2, 2023 at 2:28 p.m.	✓
Template Name Intro to Seller			
Email Subject  Congrats, {{contacts:seller:first name	e}}!		Add autofill tag
Email Body Hi {{contacts:seller:first name}}, Congratulations! Your house was offi	cially listed with Paperless Real Estate on	{{listing date}}. We look forward to taking thi	Add autofill tag s journey with you.
if you have any questions along the v Share Template Share With Everyone	vay, please don't hesitate to contact your	triends at Paperless Real Estate.	Autofiil tag help Formatting tij
Schedule Message 🚺			
On date:	When task is completed:	To recipient	(s):
1 calendar days after Listing Date Remove	Choose a checklist 🔻	Contact Roles seller X Transaction Roles Click to Select Email Addresses Enter email addresses	
Hide Schedule			Cancel Save Template

# Transaction message scheduling

Draft now. Automatically send later.

When drafting a message on a transaction, you now have the option to schedule that message to be automatically sent at a later date and time.

To schedule a message, draft your message as you normally would, click [the down arrow]

attached to the Send button, then select [Schedule Send]. Messages can be scheduled for an absolute date and time (e.g., April 22nd at 2pm ET), or they can be scheduled relative to a date on the transaction (e.g., 2 days after *Close Date*). Messages will automatically be sent when the schedule criteria is met, then appear on the transaction in the *Notes & Sent Emails* section, as usual. Note that all send times are in Eastern Time.

Search address, mis, agent, seller, buyer	C 🏠 Transactions Tasks Unassigned U	nreviewed Reports Reference			+ Add Transaction	? Help 🛞
	48 Wintergreen	Added on Mar 2, 2023 Last updated Mar 27, 2	by Hollis Holcomb 2023 by Hollis Holcomb		41 Days on market	
	Morgan Fernandez, Seller	☑ hollis+mf@paperler	sspipeline.com	. 845-827-6230		
	🗠 Note / Email 🔗 Add Contact	Send to DocuSign 🖁 Merge	Docs 🔿 Upload Docs 🔓		Q Search Doc	3
	Email this message to:					
	Listing agents	Staff (4)				
	Otis Boykin	Diona Test Kyndall Holcomb	Hollis Holcomb Miriam Benjamin			
	Send to an external email address (	•				
	hollis+mf@paperlesspipeline.com	Enter email addresses			+ bcc	
	Subject ()		Add autofill tag	<ul> <li>Message Templates</li> </ul>		
	Congrats, {{contacts:seller:first no	ame}}!		Intro to Seller	•	
	Message Audio Message				Add autofill tag *	
	Hi {{contacts:seller:first name}},				1	
	Congratulations! Your house was	officially listed with Paperless Rea	Estate on {{listing date}}. We l	ook forward to taking thi	s journey with you.	
	If you have any questions along t	he way, please don't hesitate to co	ntact your friends at Paperless	Real Estate.		
					Autofill tag help Formatting tips	
	Options Make this note private (in Notes Send me a BCC (blind copy) of t Save this message as a reusable	the message	Append complete	d tasks to message		2
	Cancel			Preview	Message Send Email	
	Attached Docs				schedule send	1
	Send docs as zip file link					
	Attach this transaction's coversh					2
	Check the yellow boxes of docs to a	ttach below.				•
	🚯 🚺 Document Name 🗘				Added On 🗘 Reviewed 🗘	
	- Listing Dage - visities to listing groups	as this transaction and office staff				

#### Learn how to Schedule a Transaction Message to Send Later $\rightarrow$

<b>48</b> Wintergreer	Added on Mar 2, 202 Last updated Mar 27	3 by Holiis Holcomb , 2023 by Hollis Holcomb	41 Days on market
Listing agents	Staff (4)		
Otis Boykin	Diona Test	Hollis Holcomb	
	Kyndall Holcomb	Miriam Benjamin	
Send to an external email address ()			
hollis+mf@paperlesspipeline.com	nter email addresses		+ bcc
Subject 🕕		Add autofill tag 👻 Messag	je Templates
Congrats, {{contacts:seller:first na	me}}!	Intro to	Seller 🔹
Message Audio Message			Add autofill tag 👻
Hi {{contacts:seller:first name}},			
If you have any questions along th Options Make this note private (in Notes a Send me a BCC (blind copy) of th Save this message as a reusable Cancel	à Sent Emails below) ne message	ontact your friends at Paperless Real Estat	Autofili tag help Formatting tips
Attached Docs			Due Calendar Days -
Send docs as zip file link			after - Close Date -
Attach this transaction's coversh	eet		Schedule Send
Check the yellow boxes of docs to at	tach below.		Cancel
🚺 🚺 Label ]) Document Name ≑			Added On 🗘 Reviewed 🌲
- Listing Docs - visible to listing agents a	on this transaction and office staff		
firpta			🔲 Mar 2, 2023 💽 🔅
HOA Addendum			🗢 Mar 2, 2023 💽
Lead Based Paint Disclosure			💭 Mar 2, 2023 🕢 🚳

Learn how each property type is performing in an instant

You can now run the *Aggregate Performance* report by *Transaction Label* to instantly assess how any property type is performing.

Financials	Aggregate Performance			
Commission Summary	This report shows how many closings your company had, how much money your X company made, and how much commission was paid to your agents and to			
Aggregate Performance	referring companies. This report also lists your 10 most productive agents.			
Commission & Closings	<u>Learn more here →</u>			
Listing Inventory Report				
Pending Inventory Report	Location Company-wide			
Pending Commissions				
Agent Income	Closing period			
Agent Commissions				
Agent Units				
Agent Production	Any Label →			
Comparative Production	Commercial Condo			
Lead Sources	Lot			
	Rental			
Account Stats	Residential			

### Fine-tune precisely which tasks to send to your external calendar

Whether you need to keep an eye on tasks that contain a certain phrase in the task name, tasks that are related to a particular transaction, or tasks where a specific agent has been @Mentioned, you can now sync tasks to your calendar based on any custom search you run on the Tasks Page. Enter your search criteria in the Search section, click [Search], then click your desired calendar link.

And keep in mind that you can set up more than one sync. If you do, set each synced calendar as a different color for easy recognition.

- My Shortcuts	Overdue and Upcoming Tasks 2 matching tasks. View of Sync tasks matching "photography" with your (Cal. Outlook or Geogle Calendar	
Emails This Week     Elagged for Admin	Q Search ∀ Filter @ Sort ▼ Columns ▼ Add Shortcut	
🗍 Frank's Tasks	photography Search Tasks	
🟠 Frank's Transactions	Due 🗘 Task 🗘 🛷 Transaction 🗘 Checklist	Status 🌲 Agents Close Date 🗘
☆ High Priority	Thu 3/2 🕨 Order Photography @admin 🦳 😑 438 Green Hill Street 👔 Residential Listing Tasks	Active Active
Photography Tasks	Thu 3/2   Order Photography @admin  B673 Hill Drive  C Residential Listing Tasks	Active A

### Include location details in your message templates automatically

*Location* detail *Autofill Tags* allow you to automatically reference a transaction location's details in your pre-defined message templates. The new *Autofill Tags* reference:

Location address

- Location email
- Location phone number
- Location fax number

Personal Profile	Message Temple	ates			
Your Commissions		you can reuse commonly sent emails.			
Tour commissions		,			
Message Templates	🗄 Add Message Template				
Manage Templates	Template	Subject	Added On	Scheduled Shared	
Scheduled Messages	Formatting		October 7, 2021 at 9:24 p.m.	<ul> <li> <ul> <li></li></ul></li></ul>	
	intro to Seller	Congrats, {{contacts:seller:first name}}!	March 2, 2023 at 2:28 p.m.	<b>≁</b>	
Integrations	Template Name				
Zapier	Intro to Seller				
Dropbox Sign	Email Subject			Add autofill tag 👻	
DocuSign	Congrats, {{contacts:seller:	first name}}!			
Your Info	Email Body			Choose an autofill tag: 🗶	
Hollis Holcomb	Hi {{contacts:seller:first nam	ne}},		listing date	
hollis+prod@paperlesspipeline.cc	Congratulations! Your house	e was officially listed with Paperless Real Estate on {{listir	g date}}. We look forward to taking		
Transaction Manager		long the way, please don't hesitate to contact your friend	a at Baparlass Boal Estata	location address	
Transaction Manager	in you have any questions a	and the way, please don't heatate to contact your mene	a de l'aportoss real estato.	location email	
Your Permissions	Share Template			location phone	
Master Admin (account-wide, unlimited access ())	Share With Everyone	•		mis more info	
	Schedule Template			Cancel Save Template	
Legal Stuff	Schedule Template				

# February 12, 2023

### Sends docs out for DocuSign signature faster and easier

#### Short version:

You can now send docs out for DocuSign signature directly from within Paperless Pipeline. Reconnect to DocuSign from your Personal Profile page, then when you send docs for signature from Reference or transactions, you'll do so without leaving Pipeline. Continue to view executed docs in DocuSign or import them back into Pipeline from Unassigned Docs.

### **Details:**

You can now send docs out for DocuSign signature directly from within Paperless Pipeline, saving you the time and effort of having to send them to DocuSign, then visit DocuSign to send them from there.

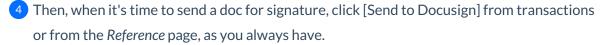
To get started, you'll need to login to DocuSign from within Pipeline to re-establish the connection between Pipeline and DocuSign. Here's how:

1 Click your name in the upper right corner of Pipeline, then [Personal Profile].



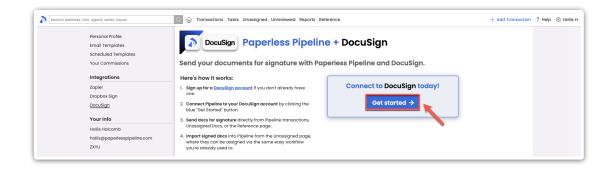


3 Click [Get Started], then follow the prompts to connect to DocuSign.



You'll be directed to specify your signers and signature fields, directly from within Pipeline.

Once your sent docs are fully executed, as before, you can either view them in DocuSign, or import them back into Pipeline from the *Unassigned Docs* page. In the near future, those docs will be drawn back into Pipeline automatically.



## Copy recipients privately when sending messages from within Pipeline

You can now add BCC (blind copy) recipients when sending message from within Pipeline. Click the BCC option to the right of the *Recipients* section to activate the field for any message.

Jack Stewart, <b>Attorney</b> Stewart Closings	∑ <u>hollis+try@paperlesspip</u>	eline.com	585-380-4520	
김 Note / Email 유+ Add Cor	ntact 🗄 Merge Docs 🔶 Upload Docs 合	ò		Q Search Doc
mail this message to:				
Listing agents	Buying agents	Staff (11)		
Elijah McCoy	John Jacob	December Release	January Tester	
		Kristian Keane	Kyn Holco	
		Misha March	Monta Test It Flem	ning
		Professor Plum (Agent)	Rachel McWhirter	
		Rajesh Dhawan	Ramu Tremblay	
		Roger Klotz	•	
end to an external email add	iress 🛈			
Enter email addresses				+ bcc
ubject 🚯		Add autofill tag 👻 Mi	essage Templates	
Enter subject		c	Choose a saved message template	*
Message Audio Message				Add autofill tag

### Download a custom list of users

The download option on the *Manage Users* page will now download whichever users are included in your current set of results. This will allow you to include or exclude inactive users or download a list of specific users, saving you from any filtering after-the-fact. To download, from *Manage Users*, Search, filter, or use the existing list of users, then click [Download Users] and follow the prompts.

iress, mis, agent, seller, buyer	Q	assigned Unreviewed Reports Reference
– People	Manage Users 1-50 d	
Manage Locations	Q Search Atd User ⊥ Dov	wnload Users 🏾 Send Welcomes
Manage Users	User	Email
	Stolen 2 - 2	stealme2@example.com
– Customize	Hank Aaron (Agent)	<u>hollis+hank@paperlesspipeline</u>
Company Settings	Carol Admin	carol+cake57@paperlesspipeli
Transaction Statuses	Hello Agent	hollis+hs@paperlesspipeline.co
Transaction Labels	Kyndall Agent	kyndall+devagent@paperlessp
Document Labels	Carol Agent Only	carol+cake34@paperlesspipel

# Assess agent Pending performance in a single report

You can now report on an agent's Pending commission totals when you need to assess their productivity based on Pending transactions. With the new Transaction Status option on the *Agent Income* report, you can run the report based on Closed or Pending transactions. From the *Reports* left menu, select [Agent Income], then select whether you'd like to view Closed or Pending transactions.

Financials Commission Summary Aggregate Performance	Agent Income This report shows detailed financial figures from closed (or p transactions for any individual agent in your company. Learn more here →	pending) X
Commission & Closings		
Listing Inventory Report	Search for Agent	Search and select an agent from the
Pending Inventory Report	Enter agent's name	dropdown list. Then click "Download Agent
Pending Commissions	Closing period	Income".
Agent Income	Last Month	<b>~</b>
Agent Commissions	Label	
Agent Units	Any Label →	<b>~</b>
Agent Production	Transaction Status	
Comparative Production	Closed	<b>•</b>
Lead Sources	Pending	
Ledd Sources	Closed 🗸	
Account Stats		

### Find your task instantly when clicking from the Tasks page

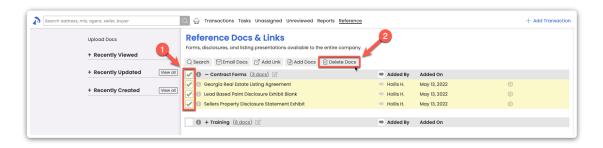
When clicking a task on the *Tasks* page, the system will now scroll straight to the task on the transaction, and highlight it so you don't have to search for it.

Note that you need to have *Checklist Scrolling* turned on for the scrolling part of this feature to work.

- My Shortcuts			with your <u>ICal</u> , <u>Outlook</u> or <u>Goo</u>						
☆ For Broker Review ① Key Dates	1	Q Search	∀Filter @ Sort ▼ Co	olumns	•				
		Due ≑	Task 🌲	~	Transaction  \$	Checklist	Visibility 🌐	Status 🌲	Agents
+ Recently Viewed		Mon 2/6	Add Client Contacts		149 Union Avenue, Men L Residential	General Listing	Listing Agents	Ready to Close	8
+ Recent Lookups	1	Mon 2/6	Add More Info		149 Union Avenue, Men L Residential	General Listing	Listing Agents	Ready to Close	8
		Mon 2/6	Listing Agreement @agent	0 <sup>4</sup>	149 Union Avenue, Men L Residential	General Listing	Anyone	Ready to Close	8
+ Recently Updated	View all		Property Profile		149 Union Avenue, Men L Residential	General Listing	Listing Agents	Ready to Close	8
		Mon 2/6	Add Client Contacts		149 Union Avenue, Men L Residential	General Listing	Listing Agents	Ready to Close	~
+ Recently Created	View all	Mon 2/6	Add More Info		149 Union Avenue, Men L Residential	General Listing	Listing Agents	Ready to Close	8
		Mon 2/6	Listing Agreement @agent	O <sup>6</sup>	149 Union Avenue, Men L Residential	General Listing	Anyone	Ready to Close	8
	1	Mon 2/6	Property Profile		149 Union Avenue, Men L Residential	General Listing	Listing Agents	Ready to Close	8
		Tue 2/7	Legal Description		149 Union Avenue, Men (L Residential	General Listing	Listing Agents	Ready to Close	8
	1	Thu 2/9	Legal Description		149 Union Avenue, Men L Residential	General Listing	Listing Agents	Ready to Close	8

# Save time by bulk deleting obsolete library items

Have obsolete material on your *Reference* page that needs to be removed or updated? You can now bulk delete multiple *Reference Docs* in a single action. Select multiple docs by checking each doc individually or by checking a category of docs. Then click [Delete Docs].



# Save time by managing master admin access directly in Pipeline

Master admins may now fully manage the addition or removal of other master admins directly from *Manage Users*. Who is authorized to make such changes has not changed, only the ability to perform the changes directly from within Pipeline, has.

To add a master admin, an existing master admin can visit the desired user's profile, then check "Make master admin" from the "Account-wide Permissions" section.

To remove a master admin, an existing master admin can select the desired user's gear icon from the Manage Users list, then "Remove master admin"

Search address, mis, agent, seller, buyer	Q 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference
- Financials Agent Fees	lnclude this user in the staff recipients section of Notes
Client Fees Deductions	+ License # and Other Info
Commission Basis	+ Commission Percent, Cap, & Notes, Payable Corp, Start Date
+ Backups	User Status
- Billing	Active
Upgrade / Downgrade	User Permissions
Update Credit Card Billing History	Grant permissions below to control the specific actions this user may perform in the selected office location.
+ Add-On Modules	- Account-wide Permissions
+ Integrations	Make master admin (Review <u>permissions</u> before granting)
Current Plan	Download company-wide backups
Transaction quota 10	- Broadway Office
Transactions created 1 Transactions remaining 9	Create transactions
Commission module Free Trial	Change listing/selling agents of own transaction Change transaction status

Make adding checklists to transactions easier by filtering out unneeded locationspecific checklists

If your office has a need to only allow checklists that belong to a transcation's location to be added to that transaction, you can set your account accordingly.

This limitation is typically useful when you:

- Have more than one location
- Your checklists differ based on which location(s) they belong to
- You want to reduce the clutter of OR visibility to the checklists in the other location(s).

By default, all checklists are add-able to all transactions, regardless of the checklists' location. If you need to restrict that to only allow checklists from the transaction's location to be added, from Company Settings, uncheck "Show checklists from all locations in the Add Checklists dropdown menu" then Save. The setting can be changed at any time if your needs change in the future.

As always, feel free to setup a call  $\rightarrow$  if you ever have any questions about the setup of your checklists or feel they might benefit from a tune-up.

Search address, mis, agent, seiler, buyer	Q 🏠 Transactions Tasks Unassigned Unreviewed Repo	ts Reference
- Financials Agent Fees Client Fees Deductions Commission Basis	Email agents when admin comments on documents     Email monthly production summary to agents     Email admins agent anniversary reminders     Use minimal formatting for messages sent from     transactions. See Examples	
+ Backups	Feature Settings	
- Billing Upgrade / Downgrade Update Credit Card Billing History	Require two-factor authentication         Image: A straight of the st	
+ Add-On Modules	Checklist Settings	
- Integrations Zapier Dropbox Sign DocuSign	Show checklist completion percentages to agents	If If unchecked, only checklist templates from the location of the transaction being viewed will be available to be added to that transaction.
Current Plan	Financial Settings	
Transaction quota 450+ Transactions created 83	Use start dates of agents to determine fiscal years for year-to-date calculations	
Days until next bill 487 days	Vse agent's commission split to calculate sales volume	

# Know a completed task's original due date at-a-glance

The due dates of tasks will now continue to be displayed even after they have been marked as complete, saving time from hovering.

Search address, mis, agent, seller, buyer	Q 4	Transactions Tasks Unassigned Unreviewed Reports Reference
<u>View Transaction</u> Edit Transaction Upload Docs Transaction History Deleted Docs Received Emails (0) Download Transaction Manage Commissions		123 Main Street       Added on Jun 30, 2022 by Hollis Holcomb Last updated just now by Hollis Holcomb         Email docs and notes to this transaction: 4568212-111443-TX-2801@docs.paperlesspipel         General         Status:       Active         MLS #:       123123123123         Label:       Condos/Townhouses         Side:       Listing & Buying         Location:       Canal Lane
Checklists : + - Listing checklist Seller's Property Disclosure Financial Addendum Well water Disclosure Lockbox Keys MLS Information Lead-based Paint Disclosure (if applicable) Listing Agreement Agency Disclosure Mold Disclosure Add doc name or task	56% >> 2/3 2/10 2/2 2/2 2/10	Seller & Buyer
		Buying Agents ③

COMMISSION MODULE

# Determine whether agents have met their cap at-a-glance when pending transactions need to be considered

If processed *Pending* transactions should be considered when determining whether agents have reached their commission cap, you can now set your account to consider them. On the Company Settings page, check *Display Pending transaction totals in the year-to-date commission threshold section*, then Save.

Search address, mls, agent, seller, buyer Upgrade / Downgrade Update Credit Card Billing History	Transactions Tasks Unassigned Unreviewed Report     Enable Reviewed Docs functionality     Enable Entered Docs feature     Enable New Offer feature	s Reference
+ Add-On Modules	Checklist Settings	
<mark>– Integrations</mark> Zapier Dropbox Sign DocuSign	Show checklist completion percentages to agents  Hide completed tasks in transaction checklists  Show checklists from all locations in the Add Checklists dropdown menu	
Current Plan       Transaction quota     450+       Transactions created     83       Days until next bill     487 days date       Next bill date     10/11       Commission module     Active       Total monthly charge     \$779*	Financial Settings         Image: Use start dates of agents to determine fiscal years for year-to-date calculations         Image: Use agent's commission split to calculate sales volume         Image: Display Pending transaction totals in the year-to-date commission threshold section         Broker Name for Commission Disbursement         Unlimited Real Estate	Check this box if, during CDA generation, you want the system to display your agents' Pending Transaction totals in the YTD Commission Split Threshold section. If unchecked, only Closed Transaction totals will be displayed.
Admin & Support Rajesh Dhawan rajesh+devppl@paperlesspipeline.com 555-555-5555	Transaction Settings         Enable auto-expiration of transactions in Listed status         Image: Setting and transaction label         Image: Allow agents to change transaction status to closed, terminoted, and expired	

If enabled, when you're managing commissions, you'll see both Closed totals**and** Closed+Pending totals to help you determine whether a cap has been met.

Next, we will neip you aistrib the referral commission of \$	ute the proker/agen	Unreviewed Reports t commission of \$3,412.		+ Add Transaction ? He	lp 💮 Hollis
roker / Agent Commission	Disbursement		Edit Prev Step		
Distribute Listing Commission:			\$2,468.36		
Distribute listing gross betwe	en 2 agents				
Carol Agent Only Charles Agent		50% 50% I	* % \$	Charles Agent - YTD figures (Jan. 27, 2020 to Jan. 26, 2	021)
Allocate sales volume and ur	nits	Sales Volume \$50,000,00	Unit	Agent performance Closed transactions: Closed listings:	
Charles Agent		\$50,000.00	0.5	Closed sales: Units:	
Specify agent / brokerage sp	Brokerage	Agent	* •/ dt	Sales volume:	\$100,000.0 Closed Pendir
Carol Agent Only Charles Agent	75% 25%	25% 75%	* % \$ * % \$	Agent's current split: 7 Commission to brokerage before this	5% 00 \$2,325.0
Distribute Buying Commission:			\$944.32	Next commission split threshold: Not specifi Agent start date: Jan. 27, 2	ed
Allocate sales volume and ur	nits	Sales Volume	Unit	Commission totals before this transaction Clos	ed Pendi
Candy Cane		\$100,000	1		.00 \$4,650.0
Specify agent / brokerage sp	Brokerage	Agent	* •/ d:		00 \$2,325.0 00 \$2,325.0 00 \$0.0
Candy Cane	0%	100%	* % \$	Update commission split for Charles Agent →	

The Top Performers section of the *Aggregate Performance* report will now exclude any inactive users, giving you a cleaner picture of who your active performers are.

Aggregate Performa Coffee is for Closers Realty - D			
Performance	Brokerage		
Agent sales volume	Commissions		
Agent listing volume	Listing-only commissions		
Agent buying volume	Buying-only commissions		
Total units	Dual-agency commissions		
Listing units	Franchise Fee		
Buying units	Fees & taxes collected		
Number of closings	Net payable		
Average sale price	Agents		
Gross commission	Commissions		
Outside referral fees	Listing-only commissions		
	Buying-only commissions		
	Dual-agency commissions		
	Fees & taxes paid		
	Net commissions		
	Net payable		
Top Producers by Sales Volume	(\$)		
1 Tom Cruise	6 Michael Angeletti		
2 Otto Phil	7 Monta Fleming		
2 010 1111			

# October 9, 2022

### Fully integrated document signing is here!

Pipeline is now integrated with HelloSign providing you a smooth, simple process for requesting signatures directly from Pipeline transactions and the *Reference* page. Once your Pipeline account is connected to your paid HelloSign account, you'll see options to send docs for signature, send reminders, cancel, and check the status of any requests you've sent from Pipeline. Once docs are fully executed, they'll automatically arrive in *Unassigned Docs* where they can be assigned via the

same easy workflow you're already used to.

Watch a 1-minute video about how it works? →

Sign up / learn more about Paperless Pipeline & HelloSign →

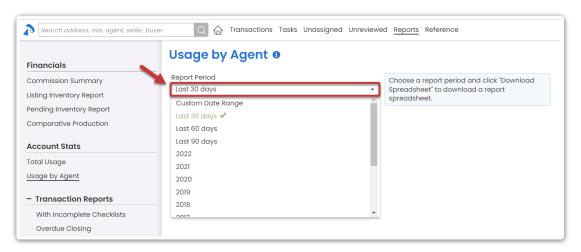
View full Paperless Pipeline & HelloSign help article here →

Search address, mis, agent, seller, buye	r Q ☆ Transactions Tasks Unassigned Unreviewed R	Reports Reference	+ Add Transaction	? Help	Hollis H.
Personal Profile Email Templates Your Commissions	Paperless Pipeline +	HelloSign			
Integrations	Send your documents for signature with He	elloSign and Paperless Pipeline.			
Zapier	Here's how it works:				
HelloSign	1. Sign up for a paid HelloSign account if you don't already	Connect to HelloSign toda	y!		
DocuSign	have one. *				
Your Info	<ol> <li>Connect Pipeline to your HelloSign account by clicking the blue "Get Started" button.</li> </ol>	Get started →			
Hollis Holcomb	3. Send docs for signature directly from Pipeline transactions				
hollis@paperlesspipeline.com	or the Reference page.				
Z	<ol> <li>Remind, cancel, or check the status of requests from within Pipeline (along with email notifications, of course!)</li> </ol>				
Your Permissions	5. Signed docs arrive automatically into Unassigned Docs,				
Master Admin (account-wide, unlimited access ())	allowing them to be assigned via the same easy workflow you're already used to.	ţ\$			

### Get a quick count of agents' closed transactions

The Usage by Agent report now includes a column for Transactions Closed, allowing you to quickly view the number of transactions closed for each agent during your specified report period. For offices subscribed to the Commission Module, this report does not consider whether commissions have been entered.

### Learn more about the Usage by Agent Report $\rightarrow$



### Save time by bulk-changing the permission category of mis-categorized docs

Docs get assigned to the wrong *Permission Category*? Change them to the correct *Permission Category* all at once. Click the 2 at the top of the documents section of transactions to start the

process for any docs on that transaction.

Learn more about Bulk Changing Permission Category here →

Indiadual matury     Statu:::::::::::::::::::::::::::::::::::	tion	23 Main Street Added on Ju Last updated oil docs and notes to this transaction: 4568212-1114		77 Days on market
Indiaduction Instary     Statut:: A date     Listed On: Jun /, 2022     C       Beleted Docs     MG sit: 123323233     Listed On: Jun /, 2022     C       Received Emails (0)     Listed Control Control     Listed Control     Listed Control       Download Transaction     Liste: Condou/Transaction     Liste: Condou/Transaction     Liste: Condou/Transaction       Manage Commissions     Saler's Engenty Disclosure     Saler's Silog:: Silog:     Commission Summary: 3% for all agents       Saler's Property Disclosure     Liste Frie: Silo,000     Commission Summary: 3% for all agents       Saler New Completed Lists     More Info     Admin Info (set/visite to admin soth)       Info Info     Admin Info (set/visite to admin soth)     Liste Agents ©       Ver Fulli:     Add doc nome or task     HERE	Ge	eneral	D	
Received finals (a) Lobe:: Condoid/Townhouses   Download Transaction Side:: Usting   Manage Commissions Seller & Buyer     Checklists : + 44% /   - Usting checklist Seller & Buyer   - Usting checklist Sale & Commission   Sale & Commission Sale & Commission   Sale & Commission Sale & Commission   Sale & Commission Mare Info:   Sale & Commission Sale & Commission   Sale & Commission Sale & Commission   Usting Addendum More Info:   Mare Info: Addmin   More Info: Admin   Veor Fulli: admin   Add doc nome or task HBRE	History	Status: Active	Listed On: Jun 7, 2022	coversheet
Nachardbart Linking (M)   Manage Commissions     Side:   Listing Commissions     Seller & Buyer     Seller & Buyer     Sole & Commission Summary:   Store Checklists   List Price:   Store Checklists   Seller & Buyer     Sole & Commission Summary:   Sole & Commission Summary:   More Info   Commission Summary:   More Info   Add doc nome er task   List Price:   Add doc nome er task     Listing Agents @	s	MLS #: 123123123123		
Download Transaction   Manage Commissions     Checklists : +     Isting checklist     Isting checklist     Sele & & Buyyer     Sele & & Buyyer     Sale & Commission Summary: 3% for all agents     Sale & Commission Summary: 3% for al	nails (0)	Label: Condos/Townhouses		
Manage Commissions     Location: Canal Lane       Checklist: : +     44% ✓       - Listing checklist     =       - Listing checklist     : +		Side: Listing		
Checklist     +     44%       - Listing checklist     -       - Listing checklist     -       - Geod-based Point Disclosure (if applicable)     -       - Mid Madernametion     B/2       * Show completed tasks _=     -       Add doc nome or task     Listing Agents @		Location: Canal Lane		
- List Price::::::::::::::::::::::::::::::::::::		ller & Buyer		
I utt Proc. 's 150,000'     Commission summary: 3x for all ogents       Geod-based Point Disclosure (if applicable)     Sale Price: \$123,000       Innoncial Addendum     Admin Info (erry visible to admin statt)       Innoncial Addendum     Lock Box       Veri Public Disclosure     Some default       Y Show, completed tasks     Add do nome or task       Add do nome or task     Listing Agents @		Ile & Commission		
ladd-based Point Diclosure (if applicable)     Admin Info (only visible to admin statt)		List Price: \$150,000	Commission Summary: 3% for all	agents
applicable)     More Info     Admin Info (orky visible to admin stott)       binancial Addendum     Icok Box     Some default       MS information     I/28     Year Built:     admin       Well water Disclosure     Agent Owned:     info       Add doc name or task     HERE		Sale Price: \$123,000		
Inconciol Addendum     Lock Boc     Some default       MtS Information     B/92     Year Suit:     admin       Well water Disclosure     Agent Owned:     info_       ✓ Show completed tasks     HERE     HERE	blo		A share in the fact (and substantial share)	
M bit information     B/2#     Year Built:     odmin       W ell vater foisosure     Agent Owned:     Info       ✓ Show completed tasks →     HERE       Add doc nome or task     Listing Agents	al Addendum			
Show.completed tasks ==     Add doc name or task      Listing Agents       Listing Agents				
Add doc name or task		Agent Owned:		
Listing Agents 💿			HERE	
	Add doc name or task	isting Agents 💿		
Eililau wocoy 🖂 i <u>toinis-teililau/idibalaeuezshibeiinercom</u> 🗍 pop-pop-popo	Eli	lijah McCoy	hollis+elijah@paperlesspipeline.com     ∫     555-55	55-5555
🖻 Note / Email 🔗 Add Contact 🖇 Marga Dacs 🖞 uplead Dacs 👌		] Note / Email 🛛 음+ Add Contact 🛛 뭄이 Mei	rge Docs 🔿 Upload Docs 🔓	Q Search Doc

## Relate a single checklist to multiple Locations and Transaction Labels

Instead of relating a checklist to either**one** or **all** *Locations* and *Transaction Labels*, you can now relate a single checklist to **multiple** *Locations* and **multiple** *Labels*. This new option:

- Allows you to set a single checklists to be automatically added to transactions in multiple *Locations* and with multiple *Labels*
- Allows you to give checklist-related permissions to a single checklist for admins in different *Locations*
- Helps organize and streamline your checklist setup (since you no longer need multiple checklists to represent multiple *Locations* and *Labels*).

If you previously created multiple checklists to represent multiple*Locations* or multiple*Labels* and would like to combine those into single checklists, learn how here  $\rightarrow$ .

Learn more about Managing Checklists here  $\rightarrow$ 

Search address, mls, agent, seller,	buyer O A Transactions Tasks Unassigned Unreviewed Reports Reference
← Go back to Checklists	Edit Residential Listing 🛛
– People	Checklist Template Information
Manage Locations Manage Users	Locations * Broadway Office X Paperless Real Estate X Martha's Team X
– Customize	Checklist Name *
Company Settings Transaction Statuses Transaction Labels Document Labels	Listing          Automatically apply this checklist to transactions         Based on Status       Based on Side         Listed       X •
Document Names Lead Sources	Based on Label Residential X Commercial X Land and Lot X
– Templates	Automatically apply to transactions in all locations
Business Holidays Checklists	Document Names or Tasks to Track 1 Listing Agreement Due on Listing Date Visible to listing agents
Break Apart Docs	Seller's property disclosure

# July 17, 2022

# Selling Agent is now Buying Agent

For consistency and accuracy, we've updated all instances of the term "Selling Agent" to "Buying Agent" throughout the system. If you used any "Selling Agent" auto-fill tags in any of your message templates, they'll still be honored.

# Email formats have been enhanced (and un-enhanced <sup>(C)</sup>)!

You've asked for minimally-styled emails that look like they've come from a standard email system and now you've got the option! Set your account to either send simple, minimally-styled messages from transactions OR send a more styled version. All system messages have received an overhaul, as well, so they're more modern, cleaner, and easier-to-read than ever. Learn more here →

Minimally-styled emails

	To respond, reply to all.
	Doug Furnie sent you a note about <u>813 Brianciff (Listing &amp; Buyon) (Besidentiaf</u> ):
	Please Submit the Buyer's Contract
	Hi Sarah and Elijah,
	Now that this offer is accepted, can you please obtain the signed buyer's contract?
	Thanks, Doug
	Doog Fannie Coffee is for Closers Resity holischoog Geaanstwaaiolidics.com
	anticulary of the characteristic and the second sec
	Ø 20/22 Paperless Pipeline. All rights reserved.
	View this transaction
	A minimally-styled email sent to an Internal Recipient
	A minimally-styled email sent to an Internal Recipient
	A minimally-styled email sent to an Internal Recipient
	atulations!
<b>Congr</b> Hi Api	atulations! 11. atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May
Congr Hi Api Congr 31, 20	atulations! 11. atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May
Congr Hi Apt Congr 31, 20 See yo Doug	atulations! il, atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May 20.
Congr Hi Apr Congr 31, 20 See y Doug Coffe	atulations! il, atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May 20. Ju then! Funnic J is for Closers Realty
Congr Hi Apr Congr 31, 20 See y Doug Coffe	atulations! il, atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May 20. Punnie
Congr Hi Apr Congr 31, 20 See y Doug Coffe	atulations! il, atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May 20. bu then! Funnie b is for Closers Realty cdoug@gaperfesspipeline.com
Congr Hi Apr Congr 31, 20 See y Doug Coffe	atulations! il, atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May 20. Ju then! Funnic J is for Closers Realty
Congr Hi Apr Congr 31, 20 See y Doug Coffe	atulations! il, atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May 20. bu then! Funnie b is for Closers Realty cdoug@gaperfesspipeline.com
Congr Hi Api Congr 31, 20 See y Doug Doug Coffe hollis:	atulations! il, atulations on your accepted offer! We're looking forward to closing and your Close Date is set for May 20. bu then! Funnie b is for Closers Realty cdoug@gaperfesspipeline.com

# Styled emails

	Yo respond, reply to all.
	Doug Funnie sent you a note about (13 Briarcliff (listing & Buying)         [Residential):         Please submit the Buyer's Contract         H Sonh and Blah,         Has that this affer is accepted, can you please obtain the signed buyer's contract?         Thanks,         Daug         Daug Funnie         Coffee is for Cleare Realty         Kather and pleated in Cleare Realty         Mark was entabled for Eljon McCoy and Sorah Doace
	© 2002 Poperiess Position At rights meanwed. View this transaction I Log In to your account
-	A styled email sent to an Internal Recipient

## YTD popup now reflects transactions for an entire fiscal or calendar year

When managing commissions, all closed transactions with a CDAfrom the fiscal or calendar year of the current transaction's close date will be included in agents' YTD popup. In the past, only transactions through the current transaction's close date would be included, omitting any that were closed after that transaction's close date but still within the year.

### Learn more about Agent's YTD Pop-up here $\rightarrow$

### Sort contacts in the order that helps you easily find them

Sort contacts on transactions so you can quickly jump to the person you need see. Sort by role, Company/Address, Name or the Order they were added, whichever helps you find your contacts the quickest. Pipeline will remember your sort preference when you view transactions later.

	or 27, 2020 by Hollis Holcomb d 23 minutes ago by Hollis Holcomb		
More Info Lock Box: #1919	Admin Info (only visible Agent paying tran		
Listing Agents 💿			
Elijah McCoy	hollis+elijah@paperlesspipeline.com	. 555-555-5555	
Buying Agents 💿			
Sarah Goode	hollis+sg@paperlesspipeline.com		
- 5 Contacts 💿		↓ Order Added	+ Add Conta
Monta Cupcake, <b>Referrer</b> Cupcake Central	Monta+cupcake@paperlesspipeline.com	. 2225552222	
April is a regular at Cupcake Central.	When they learned she wanted to move, they refer	red her to us!	
Odysseus Davis, <b>Property Inspector</b> Odie's Property Inspection Company / 717 M	hollis+odie@paperlesspipeline.com ain Street	. (237) 912-2639	
Jack Nicklaus, Attorney	hollis+try@ohholcomb.com	. (588) 931-5135 🛛 🖶 (744)	736-7304

Learn more about Sorting Contacts  $\rightarrow$ 

### Agents can easily let admins know when a task is not applicable

Agents can now effortlessly communicate to an admin when they've determined a task is not applicable for a transaction. Train agents to SHIFT-click any task's checkbox to give them the

option to mark the task as N/A. Like agent-checked tasks, not applicable tasks:

- Will no longer appear on agent's Task page or in their task reminder emails
- Will be displayed on admins' Task page for easy access to tasks needing their attention.

#### Admins may either:

- Mark N/A tasks as complete by checking them off (they will remain crossed out to indicate they were marked as N/A, even after fully checked)
- Delete N/A tasks if they'd like to remove them from view completely

hecklists	813 Briarcliff Added on A Last update	d 14 minutes ago by Hollis Holcomb		
Pending checklist	Side: Listing & Buying			
Fully signed seller's property diclosure				
Conditional loan approval (if financing involved)	Seller & Buyer			
Preliminary title report	Sale & Commission			
Executed Counter				
Purchase contract	Sale Price: \$500,000			
Agency disclosure	More Info			
Pre-Approval (if financing involved)				
Home inspection signoff	Lock Box:			
Final walk through signoff	Listing Agents ③			
Listing checklist	Kristian Keane	🖂 kristiankeane@gmail.com	. 456-456-5555	8
□ Lead-based Paint Disclosure (if 4/29 applicable) ♂	Carlisle Lilly	Carlisle@paperlesspipeline.com		
Lockbox Keys 6/1	Buying Agents ©			
Listing Agreement of 4/14	Buying Agents (			
Mold Disclosure of	Kristian Agent	carol+agentl@paperlesspipeline.com		E
MLS Information 5/12	amary Laucala	rosemarylaucala@paperlesspipeline.com	555-555-5555	
Shift + CIC	Contacts		Order A	dded

Learn more about Checking Off Tasks →

# 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→

Financials	Comparative Production
Commission Summary	Search for Agent
Aggregate Performance	Enter agent's name
Commission & Closings	Location
Listing Inventory Report	Company-wide -
Pending Inventory Report	Closing period
Pending Commissions	2 Years 🔹
Agent Income	Download Report
Agent Commissions	
Agent Units	
Agent Production	
Comparative Production	
Lead Sources	
Account Stats	
Total Usage	

# 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!

Search address, mls, agent, seller, buye	er.	Q 🏠 Transactions Tasks Unassigned Unreviewed
View Transaction		789 Third Street Added on Feb 3, 2022 Last updated May 4, 2
Edit Transaction		Email docs and notes to this transaction: 4562059-111861-TX-275
Upload Docs		
Assign Docs		General
New Offer		Status: Pending
Transaction History		Side: Listing
Deleted Docs		Location: Paperless Real Estate
Received Emails (0)		Buyer & Seller
Download Transaction		
Manage Commissions		Sale & Commission
•		List Price: \$250,000
Checklists : +	31% 🗸	Sale Price: \$235,000
Pending Sale	Kex	Contingency Dates
Inspection	5/13	Inspection Date: May 13, 2022
Property Inspection Report	5/18	
Termite Report	5/18	More Info
Appraisal Report		Enter the required information:
Commission Disbursement Authorization	5/8	<u>∎</u> ^ – Y / N?
Home Warranty Application	5/18	
Request for Mortgage Informatic	n	Listing Agents 💿
Closing Disclosure	6/2	Betty Stone
Final Walk Through	6/2	
Show completed tasks $\rightarrow$		Mote / Email A+ Add Contact H□ Merge Docs
Add doc name or task		
		🚯 Tabel Document Name 🗅

**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.

Search address, mis, agent, seller, buyer		Q 🟠 Transactions Tasks Unassig	ned Unreviewed Reports Reference	+ Add Tro	ansad
View Transaction Edit Transaction Upload Docs		<b>789 Third Street</b> Add Email docs and notes to this transaction: <u>456</u>	led on Feb 3, 2022 by Hollis Holcomb Lupdated just now by Hollis Holcomb 2059-111861-TX-2752@docs.paperlesspipeline.com		
Assign Docs		General			
New Offer		Status: Pending	Lister	d On: Apr 7, 2022	
Transaction History		Side: Listing	Acce	epted On: Apr 28, 2022	
·		Location: Paperless Real Estate	Close	es On: Jun 3, 2022	
Deleted Docs					
Received Emails (0)		Buyer & Seller			
Download Transaction					
Manage Commissions		Sale & Commission	Total	Il Commission: \$7,050	
Checklists : +	31% 🗸	Sale Price: \$235,000			
– Pending Sale		Contingency Dates			
Inspection	5/13	Inspection Date: May 13, 2022			
Property Inspection Report	5/18	the second se			
Termite Report	5/18	More Info			
Appraisal Report		Enter the required information:			
Commission Disbursement	5/8	🖬 - Y / N?			
Authorization					
Authorization Home Warranty Application	5/18				
		Listing Agents 💿			
Home Warranty Application		Listing Agents	Mollis+tcbstone@paperlesspipeline	e.com . 404-555-0188	
Home Warranty Application Request for Mortgage Information Closing Disclosure Final Walk Through			hollis+tcbstone@paperlesspipeline	e.com . 404-555-0188	
Home Warranty Application Request for Mortgage Information Closing Disclosure	6/2	Betty Stone	은 Merge Docs	e.com [] 404-555-0188	
Home Warranty Application Request for Mortgage Information Closing Disclosure Final Walk Through	6/2	Betty Stone			Rev

### Learn how to Download a Transaction Checklist here $\rightarrow$

### 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.

Document Names or Tasks to Track 🚺	
Buyer Preapproval	1 🔍 💿 🖉 🗠
Home inspection signoff	1 🛱 🐷 😽 😤
Change status to pending in MLS (if our.	. <b>t</b> 🖻 💿 🕫 📍

Learn how to Allow Agents to Change a Task's Due Date  $\rightarrow$ 

### 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.

mls, agent, seller, buyer	Q 🏠 Transactions Tasks Unc	ssigned Unreviewed Reports Reference	+ Add Transaction	? Help 🛞 Hollis н.
d dac name or task	123 Main Street	Added on Oct 6, 2021 by Hollis Holcomb Last updated just now by Betty Stone		
	Rachel McWhirter / Outside C (or	utside) <u>hollis+dev@paperlesspipeline.com</u>		
	+ 2 Contacts 💿			+ Add Contact
	🖂 Note / Email 🛛 🐣 Add Contae	ct 🖁 Merge Docs 🕂 Upload Docs		Q Search Docs
	() Label Document Name 🗘		Added On 🗘 Reviewed	Entered 🗘
	+ Office Docs - visible to office staff	f		
	+ Listing Docs - visible to listing ag Notes & Sent Emails	ents on this transaction and office statt		<ul> <li>Q Search Notes</li> </ul>
	Betty Stone email sent To: Hollis Holcomb Just now	Seller needs an Extension for the Signed Disclosure. Will next Tuesday work?		6
	Hollis Holcomb comment May 3, 2022	Hollis Holcomb commented on "Commission Disbursement Authorizatio Please send this to the Title Assistant also.	vn":	5
	Hollis Holcomb note May 3, 2022	Commission Note The Buyer will pay a \$500 Bonus to the Listing Agent.		
		Barrada and a second state		

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.

	unu uuu speciui n		
			Edit Prev Step
Total Commission	Co-op Brokerage C	ommission & Special Instructions	
\$7,050.00	Outside Listing Agen	t	
	Name / Info: Ou	tside Agent / Outside Co.	
	Email: ho	llis+outside@paperlesspipeline.com	
	Outside Selling Agen	t	
	Name / Info: Ou	tside Agent 2 / Outside 2 Co.	
	Email: ho	llis+outside2@paperlesspipeline.com	
	Cooperating Brokera	ge	
	Amount	\$1,790.00	
	Company name / info		
			ĉ+
	CDA instructions (to	be shown above Payables)	
	CDA Instructions Top		

# Find contacts by their company name

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

Search address, mis, agent, seller, b	ouyer	Q 斺 Transactions Tasks Unass	signed Unreviewed Reports Reference
			Announcement from your admin: It's official, you've gone Paperless!
License #: ZZ-161165181251919			Search Active Transacti
<ul> <li>My Shortcuts</li> </ul>			
For Broker Review			2
(1) Key Dates			
+ Recently Viewed			🖉 What's Nev
Admin & Support			
Paperless Admin			☐ ∩ Transactions
hollis@paperlesspipeline.com			Closing In 7 Do
(204) 703-8258			
Transaction Usage			
Transactions created	6	8 O Tasks	
Transactions remaining	4	Due Today →	Documents →

Learn more about Searching, Sorting, and Downloading here  $\rightarrow$ 

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.

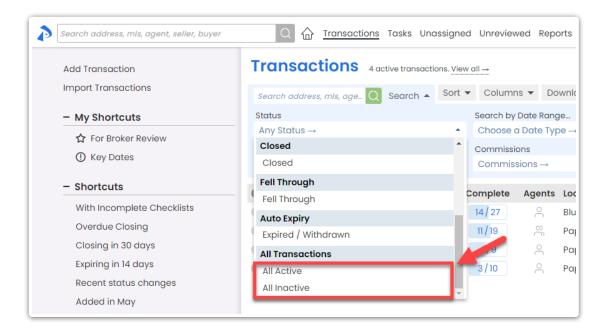
		Unassigned Unreviewed Reports Reference + Add Transaction ? Help ③
People	Manage Locations	
Manage Locations	Add Location	
Manage Users	Location	Active Users Transactions Unassigned Docs Has Commission Active
Customize	Bluffington Team Paperless Real Estate	3 6 9 2 Edit Location
Company Settings		t‡ Commission & CDA Setting
Transaction Statuses Transaction Labels		X Deactivate
Search address, m	ls, agent, seller, buyer	Q 🏠 Transactions Tasks Unassigned Unreview
- People		Edit Bluffington Team
Manage Loca	tions	Name
Manage User	s	Location Name
		Bluffington Team
- Customize		
Company Set	tings	Location Contact Info
Transaction S	tatuses	The Location Contact Info below is shown on the transaction
Transaction L	abels	cover-sheet and CDA letterhead.
		Address
Document La	bels	1300 East Main Street, Wichita, KS 67208
Document No	imes	
Lead Sources		
– Templates		
Business Holid	days	
Checklists		
CHECKIISIS		
Break Apart D	ocs	
		Phone
– Financials		555-555-5556
Agent Fees		Fax
Client Fees		
Deductions		L
		Email
Commission	Basis	admin@paperlesspipeline.com
+ Backups		Cancel Save Setting
<ul> <li>Billing</li> </ul>		

PA	PERLESS	1300 East M	s Real Estate lain Street, Wichita, KS 6 555-5556 Email: admin	7208 @paperlesspipeline.com	
Coversheet	for 234 Arrov	v Road			
Coversheet Transaction Inf		v Road			
	io	v Road			
Transaction Inf	io	v Road	Location:	Bluffington Team	
Transaction Inf Property Address:	o 234 Arrow Road	v Road	Location: Total Commission:	Bluffington Team \$10,500	

#### Learn more about Managing Locations here $\rightarrow$

### 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  $\rightarrow$ 

### 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  $\rightarrow$ 

# February 13, 2022

### Enhance your account's security with two-factor authentication

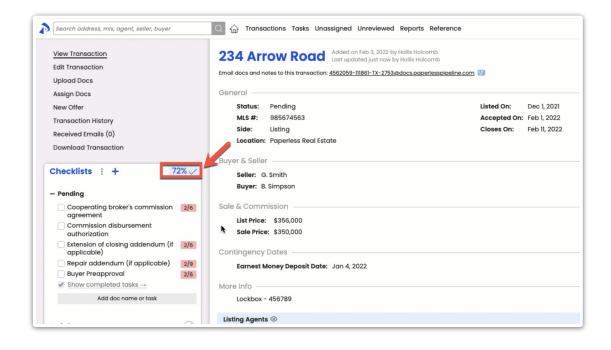
Two-Factor authentication is an optional setting that adds an additional layer of security to your Pipeline account. When two-factor authentication is enabled on the Company Settings page, all users that log in to your company's account will be required to provide the security code emailed to them in order to successfully login. Users can opt to have the system remember their device for 30 days, and admins can opt any individual user out of two-factor authentication from the user's Manage Users profile.

Search address, mls, agent, seller, buye	or Q () Transactions Tasks Unassigned Unreviewed Reports Reference
– People	Company Settings
Manage Locations	Global Settings (PP Account ID: 2021-291)
Manage Users	Company Name
	Paperless Real Estate
<ul> <li>Customize</li> </ul>	Brokerage License #
Company Settings	ZZ-161165181251919
Transaction Statuses	
Transaction Labels	Document Settings
Document Labels	Only allow PDF documents
Document Names	Prevent duplicate document uploads
Lead Sources	
– Templates	Include key dates on coversheet
Business Holidays	Email Settings
Checklists	Email agents expiring and closing transaction reminders
Break Apart Docs	
– Financials	Email agents when admin comments on documents
	Email monthly production summary to agents
Agent Fees	Email admins agent anniversary reminders
Client Fees	
Deductions Commission Basis	Feature Settings
Commission Basis	Require two-factor authentication
+ Backups	
	Enable Reviewed Docs functionality
– Billing	Enable Entered Docs feature
Upgrade / Downgrade	Enable New Offer feature
Update Credit Card	

# Learn more about Two-factor Authentication here $\rightarrow$

### View task completion status in the format that's most meaningful to you

Whether it helps you to view the PERCENTAGE or the NUMBER of tasks that are complete, it's now your choice! Click the Task Completion Status block in the upper right corner of a transaction checklist to toggle it to your desired format. If you change it, the system will remember and keep it that way.



## Get to your most urgent tasks faster

Click the new "View Overdue Tasks" bar directly from the Home page to jump right to your tasks that need the most attention.

Search address, mis, agent, seller,	buyer 🔾 🏠 Transactions Tasks Unass	igned Unreviev	ved Reports Reference	+ Add Transaction ? Help ③ Hollis H
License #: ZZ-IGHIG5H8Z5H9H9		Q	earch Active Transactions	
<ul> <li>☆ For Broker Review</li> <li>① Key Dates</li> <li>↓ New!</li> </ul>			2 Transactions Closing In 7 Days	→
234 Arrow Road 789 Third Street 456 Second Street	4 Tasks Due Today →		14 Unassigned Documents →	7 Unreviewed Documents →
Pre-Release Testing 654 Lake Road	234 Arrow Road 789 Third Street	2 tasks 2 tasks	Show List $ \smallsetminus $	Show List $\vee$
Admin & Support	View All 4 Tasks Due Today →			
Paperless Admin hollis@paperlesspipeline.com (204) 703-8258	View 11 Overdue Tasks → Hide List ∧			

# Color themes just got personal

Since people relate to their computer environment differently, every team member can now experience Pipeline based on the color theme that keeps them happiest and most productive. Each of your team members can select either the dark or light theme from their Personal Profile.

Light Theme:

Search address, mis, agent, seller, buyer	Q	슈 Transactions Tasks Unassigned U	nreviewed Reports Reference		+ Add Tr	ansaction ? Help	⊚н
View Transaction Edit Transaction Upload Docs			Added on Feb 1, 2022 by Kyndoll Holcomb Last updated just now by Hollis Holcomb 209308-TX-4814507@docs.paperlesspipeline.com			12 Days on market	
Assign Docs		General					
Transaction History		Status: Listed	Listed On: Feb 2, 2022			coversheet	
Received Emails (0)		Label: Residential					
Download Transaction		Side: Listing					
Manage Commissions		Location: Paperless Real Estate					
		Buyer & Seller					
Checklists : +	50% 🗸	Seller: Paul Amos					
- 3 - Listing - Required Docs		Sale & Commission					
Listing Agreement of MLS Printout	2/17 2/12	List Price: \$300,000					
✓ Show completed tasks →		Listing Agents 💿					
Add doc name or task		Angie Oul	kyndall+agent2@paperlesspipeline.com				
		⊠ Note / Email 🛛 Åt Add Contact 🛛 🖁	っ Merge Docs ① Upload Docs			Q Search Docs	
		🚯 🕼 🗊 Document Name 🗘		💷 Added On 🤤	Reviewed $\ensuremath{\hat{\mp}}$	Entered 🗘	
		+ Office Docs - visible to office staff					
		- Sale Docs - visible to listing and selling a	gents on this transaction and office staff				
		Buyer Inspection Notice and S	eller Response	Feb 11, 2022		۲	
		<ul> <li>Buyer Docs – visible to selling agents on</li> </ul>	this transaction and office staff				
		Need Earnest Money Check - 2nd De Need Earnest	aposit	Feb 11, 2022		•	
		Notes & Sent Emails			-	Q Search Notes	
		Hollis Holcomb	Checking In				
		emai	Hi Angle,				
		To: Angle Oul Just now	Checking in on this Listing. Can you make sure this is entered in	the MLS please?			
			Light Theme				

#### Dark Theme:

Search address, mls, agent, seller, buyer	Carlos Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Hel	> ③ Hollis H					
<u>View Transaction</u> Edit Transaction Upload Docs	8787 Woodbine Way Added on Feb 11, 2022 by Syndial Holicomb Last updated just now by Hollis Holicomb Email does and notes to this transaction: <u>2328-269308-TX-48H507@docs.gaperfess.gipelife.com</u>						
Assign Docs Transaction History Received Emails (0) Download Transaction Manage Commissions	General     Isted On: Feb 2, 2022     coversheet       Status:     Listed On: Feb 2, 2022     coversheet       Label:     Residential     titing       Side:     Listing     Listed On: Feb 2, 2022						
Checklists : + 50	Buyer & Seller						
	Sole & Commission						
Show.completed.tasks Add doc name or task	Listing Agents  Angie Oul Angie Oul Styndall+agent2#paperlesspipeline.com						
	Note / Email Ar Add Contact & O Merge Docs ① Upload Docs ② Added On © Reviewed © Entered ©						
	+ Office Docs - visible to office stoff						
	- Sale Docs - visible to listing and selling agents on this transaction and office staff						
	Need) Buyer Inspection Notice and Seller Response     Feb 11, 2022						
	Buyer Docs value to setting agents on this transaction and office staff     Meed: Earnest Money Check - 2nd Deposit     Feb 11, 2022     Go						
	Notes & Sent Emails 🔍 🔍 Search Notes						
	Hollis Holcomb         Checking in           email         Hi Angle,           Ta: Angle out         Checking in on this listing. Can you make sure this is entered in the ML5 please?           Just now         Checking in on this listing. Can you make sure this is entered in the ML5 please?						
	Dark Theme						

### The Assign page received a mini-makeover

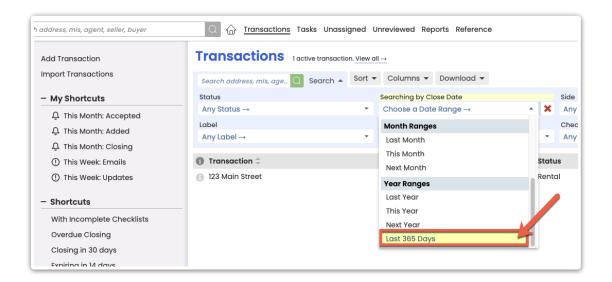
We did a little tidying up on the Assign page to streamline your document assignment process. The changes are subtle, so with the exception of the **list of assigned docs appearing at the TOP of the page instead of in Step 2**, you likely won't notice the differences.

Assign Documents to a t	ransaction					
Step 1 Choose a transaction. ?	Docs being assigned	9				
Docs: all_listing_paperwork.pdf marketing_timelines.pdf Admin_Info_tx.png						
Q Search € Advanced Search 7 Filter					< Prev Ne	ext > Last >
Recently Assigned Transactions		Status	Complete	Agents	Location	Close Date
i) assign to → 1234 Lucky Lane (Wilson) (#2)	L Residential - Single Family	Closed	4/27	8	Atlantic	Oct 14, 202
assign to -> 1234 Lucky Lane	I Residential - Single Family		1/27	0		

# December 19, 2021

## **SEARCHING & FILTERING**

Assess your company's performance based on rolling 365 days All reports and Transaction List searches now offer a "Last 365 Days" option. Combine this new option with all the existing search and filter options to target and view the exact data you need to see.



Learn more about Searching & Filtering Transactions here →

### **ADMIN CONTROLS**

**Never forget to update agents' commission info on their anniversary**. If you'd like admins to be automatically reminded to update agents' commission split information on their anniversary, head over to Company Settings and check "Email admins agent anniversary reminders". When checked, location and master admins will receive an email reminder 5 days before each user's Start Date anniversary.

Learn more about Managing Agent Commission Splits here →

No confusion about when New Offers can be created The option to add a new offer has been removed until it's an appropriate time. If you have the "Allow New Offer" feature enabled in your account, going forward, the New Offer option will only show on the left menu of transactions if that transaction is in a Pending or later status. That way, agents won't accidentally add a new offer without first entering the original offer into the main transaction.

<b>23 Main Street</b> Added on Oct 6, 2021 by Last updated just now b mail docs and notes to this transaction: <u>4562059-111861-TX-262</u>
Status:PendingMLS #:123123123Label:ResidentialSide:ListingLocation:Paperless Real Estate
uyer & Seller Seller: G. McGee Seller Lead Source: Walk In
u

### Learn how to Create a New Offer here $\rightarrow$

Associate document names with labels and categories once. Reap the benefits forever Each time a document is added to a transaction, it can now take on the doc label and permission category pre-associated with the document's name. Pre-associating labels and categories to doc names will save your team the time of having to set them manually as each doc is added.

<ul> <li>People</li> <li>Manage Locations</li> <li>Manage Users</li> <li>Customize</li> </ul>	when adding a document to a transa	con armes your users will select from totion. Optionally, if a doc name will alway an <u>Category</u> associated with it, pre-assig	
Company Settings Transaction Statuses	Add Doc Name		
Transaction Labels	+ Bulk add doc names		
	Doc Name	Default Permission Category	
Document Names	Agency Disclosure	Listing	£\$3
Lead Sources	Closir Buyer / Agent Agreement	Buyer	ŝ
– Templates	Closir Closing Disclosure	Buyer	(2)
· · ·	Commission Disbursement Authorizat	ion	<03
Business Holidays	Earnest Money Check		ŝ
Checklists	Earnest Money Check - 2nd Deposit		()
Break Apart Docs	Home Inspection Report		(j)
– Financials	HUD-1 Settlement Statement- Fully Exe	ecuted	201
	HUD-1 Settlement Statement- Prelimin	ary	- 
Agent Fees	Inspection Report	*	 {}}

Learn more about Setting Up Standard Doc Names here →

For offices that don't track compliance in Pipeline, remove Review from your view If your office doesn't track compliance in Pipeline (e.g., TC offices, Teams, etc.), you can now disable the Document Review feature to remove the unneeded fields and extra effort involved in marking docs as reviewed. To turn off review, uncheck "Enable Reviewed Docs functionality" on the Company Settings page.

# **PRO TIPS & SHORTCUTS**

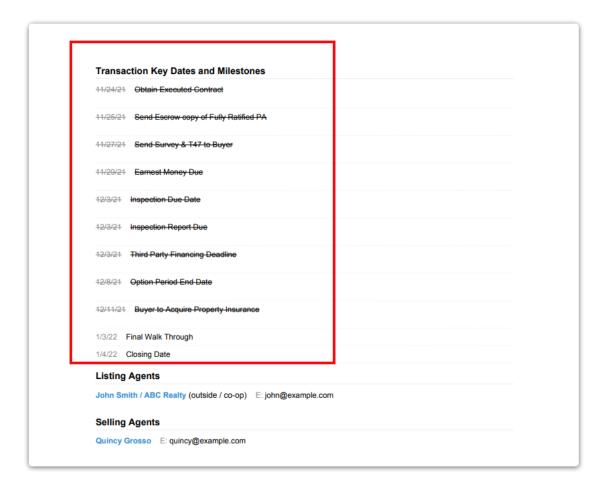
Quick-select all docs in a category when sending docs When sending a message from within Pipeline, quickly select all docs within a category by holding down the [Shift] key on your keyboard, then clicking any doc within the category. All docs in that category will be selected. You can individually deselect any that shouldn't be sent or [Shift]+click again to deselect all docs in the category.

Send docs as zip file link							
Attach this transaction's coversheet							
Check the yellow boxes below for docs	you want to email.						
🚺 🚺 Label) Document Name ≑			Added On $\ensuremath{\hat{\ominus}}$	Reviewed 🗘			
- Office Docs - visible to office staff							
Four Agency Disclosures			Dec 7, 2021		Ę		
Agent			Dec 7, 2021		ξ		
- Listing Docs - visible to listing agents on	this transaction and office staff						
Missir Listing Agreement			Dec 7, 2021		Ę		
🕦 Missir Listing Agreement (#2) 🥏 4 mins ago 🖌							
For Br Seller's Disclosure		-	4 mins ago	<b>~</b>	Ę		
- Sale Docs - visible to listing and selling ag	gents on this transaction and office staff						
Rejec Amendment to Seller's Disc	-	4 mins ago	<b>~</b>	Ę			
Lemo Short Sale Agreement	-	4 mins ago	<ul> <li>Image: A set of the set of the</li></ul>	Ś			
- Buyer Docs - visible to selling agents on t	his transaction and office staff						
Four • Earnest Money Deposit			4 mins ago	<b>~</b>	Ę		
Purple Inspection Report		-	4 mins ago	<ul> <li>Image: A set of the set of the</li></ul>	ξ		
lotes & Sent Emails			-	Q Search N	ote		
System	Status changed from Listing to Expired / Withdrawn (Automatic Expiration).				_		
status	· · · · · · · · · · · · · · · · · · ·						
an 30, 2020							

Learn more about Emailing Docs and Notes from Transactions here  $\rightarrow$ 

### **OTHER FEATURES**

**Track and share key dates effortlessly.** You can now designate tasks as important timeline dates that can be displayed on your cover sheets, synced to calendars, and autofilled into emails and message templates.



### Learn more about Setting and Using Key Dates here →

Avoid click-thru by viewing Sale Price, Buyer, and Seller from your Transactions List: If your workflow will be helped by viewing Sale Price, Buyer, or Seller on your Transactions List, enable them under the Columns tab.

	0.00												
Add Transaction	Transactions 1-50 of 73 match	ing transo	actions	. View all active transtactions -									
Import Transactions	Search address, mis, age 📿 Search 🔺	Sort -	- Co	Download -	Ad	ld Shortcut	t				« First < Prev	Next > Last >	
- My Shortcuts	Status		s	Status			Side				Location		
Admin Tasks	Pending	X -	-	Complete			▼ An	y Side $\rightarrow$		*	Any Location →	*	
M Admin Tusks	Label		c	Location			Che	cklist Statu	s				
- Shortcuts	Any Label →	*	-	Sale Price			▼ An	y Checklis	t →	٠	Sea	rch	
With Incomplete Checklists	Transaction \$		~	Buyer Seller	s	Status	Comple	te Agents	Sale Price	Bu	yer	Close Date 🗘	
Overdue Closing	123 Test St, Topeka, KS 12345				ial C	Continge	0/29	ŝ	\$100,000	Во	b Buyer	Dec 31, 2021	
Closing in 30 days	5201 Broadway Avenue Austin TX 7736	3			lex C	Continge	0/29	0	\$675,000	Tin	nothy Petra	Sep 22, 2020	

### Learn how to Show and Hide Columns on the Transactions List $\rightarrow$

**Know the stage of a transaction at-a-glance**: Transactions now display key stages in the upper right corner of each transaction as that transaction progresses through its life cycle. Key stages include:

- Days on Market
- Days since Accepted
- Days to close

Edit Transaction Upload Docs	Email docs and notes to this transaction: 4562059-111861-TX-2622@	docs.paperlesspipeline.com						
Upload Docs		Email docs and notes to this transaction: 4562059-111861-TX-2622@docs.paperlesspipeline.com 🜆						
Assign Docs	General							
New Offer	Status: Pending	Listed On: Oct 1, 2021	coversh					
Transaction History	MLS #: 123123123	Closes On: Jan 8, 2022						
Received Emails (0)	Label: Residential							
Download Transaction	Side: Listing							
Download Hanadelon	Location: Paperless Real Estate							
Checklists 0/18	Buyer & Seller							
	Seller: G. McGee							

**New look for completion ratio meter:** The completion ratios displayed on the Transactions List have a new look. The ratios have stayed put, but their background is now a single blue color that's appropriately filled in based on how complete the transaction's checklist is.

C In <u>Transactions</u> Tasks Unass	igned Ur	nreviewed Re	ports Referen	ce					+ Add Trans	action ? H
<b>Fransactions</b> 6 matching tran	sactions. Vi	ew all active tran	sactions $\rightarrow$							
Search address, mls, agen 📿 Search 🔻	Sort 👻	Columns 👻	Download $\bullet$	Add	Shortcut					
🕽 Transaction 🌲				S	tatus	Complete	Agents	Sale Price	Buyer	Close Date
98 Cinnamon Road		L+B	Condo/Townho	ouse O	offer Pen	14/67	ĉ	\$120,000	James Willenthrope	Nov 16, 2021
🗊 789 Jingle Way			L Comme	rcial O	offer Pen	12/20	2		Peace	
🗊 90 Candy Lane			L+B Lis	sting O	offer Pen	6/24	ĉ	\$520,000	Jim Jones	
456 Second Street			L+B Comme	rcial O	offer Pen	21/21	00	\$611,655.55	testname	
🕦 123 Main Street			Condo/Townho	ouse O	offer Pen	4/16				
944 Orchard Lane Juniper FL 76789			L+B Vacant L	Land O	offer Pen	0/45	0	\$475,000	Holly Parker	Aug 11, 2020

**Broker license number at your fingertips**. Your broker license number is now displayed for all users under your company's logo on the home page.

Search address, mls, agent, seller, buyer	Q 🟠 Transactions Tasks Unassigned Unrevie
Paperclip Realty	Announcement All staff are <b>bold</b> working from the break room. Visi
- My Shortcuts	
+ Recently Viewed	Q
Admin & Support	

Add your broker license number here  $\rightarrow$ 

# **COMMISSION MODULE**

**For Teams**: Set the proper payee name for your broker payables: If you're a Team who needs the Broker Payables on CDAs to reflect your brokerage's name instead of your team's company

name, enter their brokerage name in the CDA Settings' "Broker Name for Commission Disbursement" field. That name will be properly reflected as the Payee for any brokerage payables throughout the Manage Commissions process and on the CDA.

Financial Settings	
Use start dates of agents to determine fiscal years for year-to-date calculations	
Use agent's commission split to calculate sales volume	
Broker Name for Commission Disbursement	0
Unlimited Real Estate	Customize the Broker payable name listed on the Commission Disbursement Authorization. If your brokerage's share of the commission
Transaction Settings	should be made payable to name other than "Coffee is for Closers Realty", enter the Broker
Enable auto-expiration of listings	Name here. Leave blank to use Coffee is for Closers Realty.
🛹 Require transaction label	

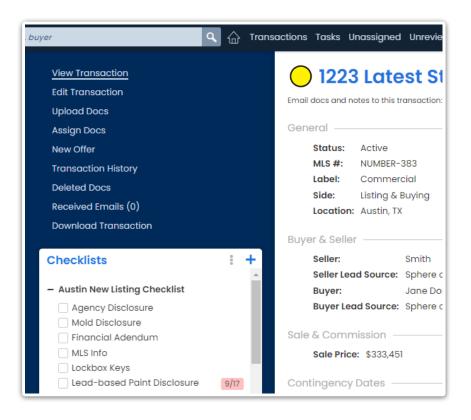
Gr	nss Sellie	a Commission:	\$100.000.00/	20% of s
	Gross Selling Commission:		\$100,000.00 (20% of	
Tra	ansaction	Gross Commission:	\$200,000.00	
Es	scrow			
Co	mpany:	Escrow 123		
Of	ficer:	Susan Smyrna	Email:	monta
Ph	ione:	3335556666		
Pa	ayables			
Un	limited R	teal Estate	\$200,000.00	
A	uthoriz	ed By		
A		arol Francis		
		arol Francis		
Ca	Ca	arol Francis		

# December 5, 2021

### LOOK & FEEL

**Style refresh is now even fresher:** We've heard your feedback, both good and bad, and have made a few tweaks we're confident you'll be thrilled with! Pipeline has still retained the clean look and feel of the previous refresh, but we've refined it to enhance distinction and focus where warranted. This new version should be even more clear, clean, and easy on your eyes than before.

Also, if your account is utilizing the "Light" theme and the distinction between elements within a page is not significant enough for you, **be sure to try out the dark theme**to see if it's more to your liking.



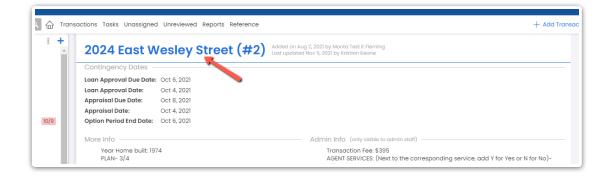
**Contact roles bolded for quick identification** Contact roles are bolded allowing you to quickly locate contacts of a certain type.

- 5 Contacts 💿 🗸					
Joe Close <b>r, Mortgage</b> 1-800-Done	⊠ <u>Hol</u>				
Jane Sm <sup>.</sup> th, <b>Outside Listing TC</b> Better Rea <mark>.</mark> ty	⊠ <u>hol</u>				
Johnny B∍yer, <b>Buyer</b> 123 Any Striet	⊠ j <u>oh</u> i				
Jack Nick aus, <b>Attorney</b> Jack Nickleus Closings	⊠ <u>holl</u>				
George Jetson, Outside Listing Agent Jetson Hornes	Mark Indi				
🖾 Note / Email 🏾 🏠 Add Contact 🛛 🛚 🖻	end to DocuSigi				
Lobel Document Name     + Listing Docs - visible to listing agents on this transaction and					
. Living 2000 Habie to living ugents of this turisdulor unc					

**Identify master and primary location admins at-a-glance** Identify Master Admins and Primary Location Admins more easily on the Manage Users list by viewing their new M and P icons.

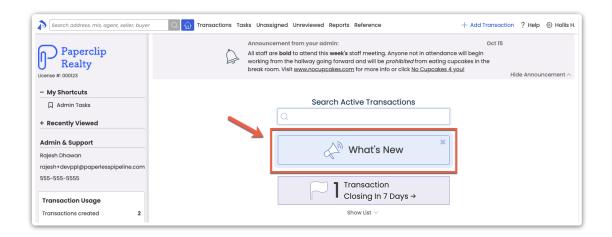
eference		
	Fole	Location
example.realtor	<b>V</b> ent	Austin, TX
perlesspipeline.com	M Paperless Pipe	li Austin, TX
iteduser@paperlesspipeline.com	Agent	Austin, TX
paperlesspipeline.co Primary Adm	in	Canal Lane
paperlesspipeline.com	P Admin	Canal Lane
ndy.cane@paperlesspipeline.com	P Admin	Dallas, TX
<u>paperlesspipeline.com</u>	Agent	Dallas, TX

**Identify the transaction you're on, no matter where you scroll** The transaction name at the top of transactions now remains frozen there, so you'll know which transaction you're on, no matter how far down the page you scroll.



#### **MORE HELP**

Take advantage of new features the moment they're released You won't be able to miss the new "What's New" button displayed whenever we launch a new release! Click it to view a list of recently released features, and it'll go away once you do. You can also still access "What's New" any time from the Help Menu.



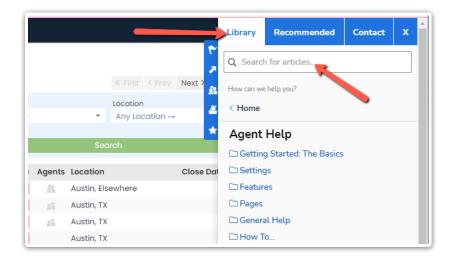
Help is closer and better than ever. Our new help widget is designed to get you the exact

information you need easier and faster! Click Get Help (from the Help Menu) to get:

• Immediately shown links to articles related to the page you're on

Transactions 1-50 of 33	32 active transact	ions. View all						Q Search for articles
Search address, mis, age 🔍 Sea	Irch 🔺 Sort 🔻	Columns • Download •				« First 🦿	Next >	Here's some info related to the page you're on?
Status		Search by Date Range		Side		Location		Creating and Using Custom Transaction La
Any Status	-	Choose a Date Type →	-	Any Side →	-	Any Location		Download a report of transactions and filts
Label		Checklist Status						<ul> <li>Download a report or transactions and filte status, close date, or other fields</li> </ul>
Any Label →		Any Checklist $\rightarrow$	-		Sec	arch		When to Add New Offers?
and capar -		The second						When to Add New Offers?

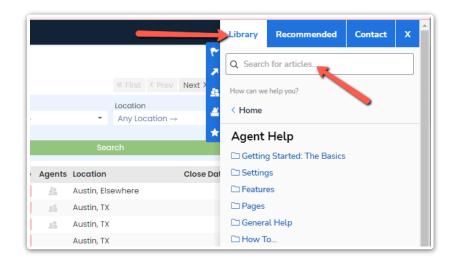
• Easy access to search the full help site



• As always, a simple way to contact us so we can help you along;

				Library	Recommended	Contact	X
			۴	Subject			
			Next >				
		Location		Details	<b></b>		
	-	Any Location $\rightarrow$	-				
			*				
	Sec	arch					
Agents	Location		Close Dat				
<u> 42</u>	Austin, Els	sewhere		↑ Unload.	an Attachment		
25	Austin, TX	(		e optoda		_	- 1
25	Austin, TX	C			Send email		- 1
	Austin, TX	C C C C C C C C C C C C C C C C C C C					

• All of the above happening within a new streamlined, in-page widget that allows you to stay within Pipeline while browsing and viewing articles.

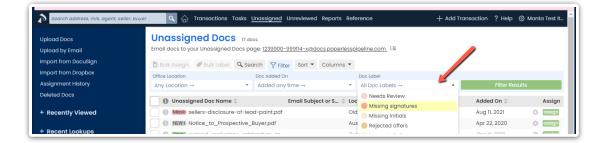


And as an added bonus, all links to articles you see throughout Pipeline will automatically launch the widget, so you'll see the exact information you need instantly AND within Pipeline! Woohoo!!!

Learn more about How to Get Help here  $\rightarrow$ 

### **SEARCHING & FILTERING**

**View docs flagged for your attention** You can now filter Unassigned Docs by custom doc labels to quickly view the docs you need to see most. Doc labels are used to categorize docs based on priority, type, or other any classification, so you can now view only the docs that match the classification you need to see.



### Learn more about Custom Color Coded Document Labels here $\rightarrow$

**Find agents' transactions based on their side** New "listing agent" and "selling agent" search options have been added to the global search bar allowing you to find transactions for an agents, only when they are on a certain side of the transaction. To run the search, select "listing agent" or "selling agent", type the agent's name or email address, then hit [Enter] on your keyboard.



Learn more about Searching & Filtering Transactions here →

View tasks based on their status or side: New "Status" and "Side" filter options allow you to find tasks based on the side of the transaction represented and/or the status of the transaction.

Overdue and Upcor Sync tasks with your <u>iCal</u> , <u>Outlook</u> or	Google Calendar			
Q Search ∏ Filter Q Sort ▼	Columns 👻 Add Shortcut		~ ~	First < Prev fext > Last >
Task Visibility	Task Due Date	Status 🛃	Side	4
All Visibilities	<ul> <li>Any Due Date</li> </ul>	<ul> <li>Any Status →</li> </ul>	<ul> <li>Any Side -</li> </ul>	÷ *
Agent Name				
Search by agent name	Agent Checked	Your @ Tasks		Filter Tasks
Due 🗘 🛛 Task 🌩	Transaction \$	Checklist	Status 🌲	Agents Location ≑
Sat 2/21 Agency Disclosure	7500 Barton Springs Road	Standard Listing Checklist	Listed	Austin, Elsewher
Cat 2/21 Financial Addandum	7500 Barton Opringe Board	Ctandard Listing Chaoklist	Listad	- Austin Flaguebor

Learn more about searching and filtering tasks here  $\rightarrow$ 

**Store your custom Task & Unreviewed searches for instant access later.** You've told us how much you love saving your frequently-run *transaction* searches. Now you can create shortcuts for Task & Unreviewed searches, filters, and sorts, too! After running a Task or Unreviewed search or sort in Pipeline, click "Add Shortcut" to save your custom search to be run instantly from your Shortcuts menu on the Home, Tasks, and Unreviewed pages.

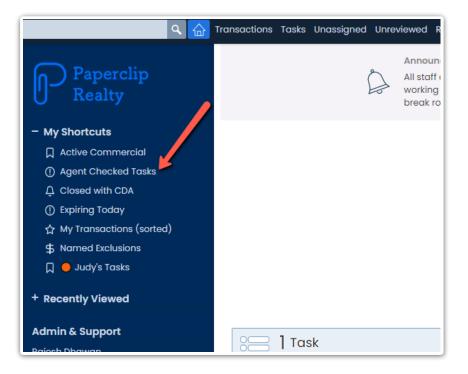
Learn more about Saving Custom Searches & Sorts here  $\rightarrow$ 

				_				
– My Shortcuts				<b>•</b>	Google Calendar			
☐ Active Commercial △ Closed with CDA	<b>Q</b> Search	√ Filter	Sort 🔻 Co	olumns 🔻	Add Shortcut			
<ul> <li>Expiring Today</li> </ul>	Task Visibili All Visibili	,	-	Task Due D		Status ✓ Any Status →	÷	Side Any Side -
☆ My Transactions (sorted) 口 My tasks due today	Agent Name Search by	e agent name		Agen	t Checked	Your @ Tasks		
S Named Exclusions Judy's Tasks	Due 🗘	Task 🗘		🗸 Tra	nsaction ‡	Checklist	St	atus \$
	Wed 9/19	Selection of Ter	mite Inspection	🕘 1234	4 Main Street, Dallas TX	Timeline of Contingencies	CI	osed
+ Recently Viewed		Seller to provide			4 Main Street, Dallas TX Saddle Spur Trail Austin, TX 5	Timeline of Contingencies 5 Listing checklist		osed pired / Withd
+ Recent Lookups	Wed 4/10	Listing Agreeme	ent @jsmith @o		1 Michael Agent Street	Austin New Listing Checklist	Lis	ted

"Agent-checked" & "Your @ Tasks" are now combinable with other filters: You can now quickly access tasks agents have indicated they've completed and tasks where you've been @mentioned from the Filter dropdown menu on the Tasks page. That means you can combine those filters with all other task filters to help you hone in on the tasks you want to see.

Sync tasks with your <u>iCal</u> , <u>Outl</u>				
Q Search 7 Filter Q	Sort  Columns  Add Shortcut		« I	First < Prev fext > Last »
Task Visibility	Task Due Date	Status	Side	4
All Visibilities	<ul> <li>Any Due Date</li> </ul>	<ul> <li>Any Status →</li> </ul>	<ul> <li>Any Side →</li> </ul>	
Agent Name				
Search by agent name	Agent Checked	Your @ Tasks		Filter Tasks
Due 💠 🛛 Task 🌩	🛹 Transaction ≑	Checklist	Status 🌲	Agents Location ≑
Sat 2/21 Agency Disclosure	e 7500 Barton Springs Road	Standard Listing Checklist	Listed	Austin, Elsewher
Cat 9/01 Financial Addends	7500 Barton Opringe Board	Ctandard Listing Checklist	Listed	- Austin Floowbor

And as an added bonus, as mentioned, you can now save task filters as custom shortcuts. That means you can have instant access to your agent-checked and @mentioned tasks from your home page!

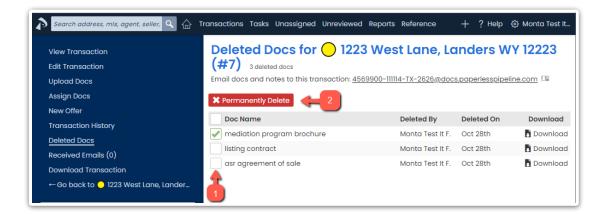


### **ADMIN CONTROLS**

**Start managing commissions whenever you're ready**. You now have 100% control over Paperless Pipeline's Commission Module on your account. This means you can activate the Commission Module without having to contact Support or fill out additional forms. Check it out from the left menu of Admin/Settings under the Add-ons section.

#### Learn more about the Commissions & Reporting Module here →

**Fully delete docs that need to be inaccessible**: Deleted docs that need to be fully removed from the system because they contain sensitive information or otherwise need to be inaccessible can now be removed. Master admins can click "Deleted Docs" from the left menu of Transactions and Unassigned Docs, then either bulk or individually permanently delete the docs from there.



Move inactive locations out of your team's way Deactivate locations no longer in use so you and your team can focus on the data that matters. Transactions and users can not be added to deactivated locations, and any transactions that may exist in deactivated locations will be grayed out to indicate their inactive state. Visit Admin | Manage Locations and click the gear icon to deactivate a location.

Manage Locations				
<b>Q+</b> Add Location				
Location	Active Users	Transactions	Unassigned Docs	Active
Austin, TX	67	436	5	<ul> <li> <ul> <li></li></ul></li></ul>
Canal Lane	2	0	0	🗸 🔅
Canal Lane Dallas, TX	2 20	0 48		✓ @ Z Edit Location

#### Learn more about Managing Locations here $\rightarrow$

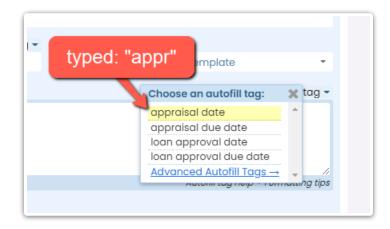
#### PRO TIPS & SHORTCUTS

Take a shortcut to editing transactions

The new [ctrl + shift + E] shortcut allows you to quickly access the edit page of a transaction. While viewing a transaction's main page, hold down the [ctrl] and [shift] keys on your keyboard, then tap the [E] key.

#### Learn about more keyboard shortcuts here $\rightarrow$

**Build personalized message templates faster**: Type-ahead has been added to the list of auto-fill tags on messages to allow you to find the tag you need faster. Engage the auto-fill tag list then start typing a tag name to see matching tags. If you're not using auto-fill tags in your message templates, you're missing out on seriously personalized automation! If you're not using message templates...I have no words.



Learn more about Autofill Tags in Emails here  $\rightarrow$ Learn more about Reusable Message Templates here  $\rightarrow$ 

### **COMMISSION MODULE**

Know exactly how much remains before an agent meets their commission split threshold No need to calculate how much is remaining before an agent's next commission split. The system now displays "Remaining Commission to Next Split Threshold" on the Agent Commission report and YTD Production email.

Home Realty			
Jonathan Car	еу		
Commission figures (	March 1, 2021 to Nov. 1	0, 2021)	
Current commission perce	nt 95	Transactions closed	5
Next commission split threshold	\$15,000.00	Listings closed	1
Remaining commission to next split threshold	\$6,897.22	Sales closed Total units	5
Commission to broker	\$8,102.78	Listings units	1
Agent start date	March 1, 2020	Sales units	3.48
		Transaction gross commission	\$272 631 96

Calendar Yea anuary 1, 2021 to S	r-to-date September 30, 2021
7	Transactions Closed
2	Listings Closed
6	Sales Closed
5.81	Total Units
1.33	Listing Units
4.48	Sales Units
\$339,091.92	Transaction Gross Commission
\$5,499,088.00	Total Sales Volume
\$15,000.00	Next Commission Split Threshold
\$4,839.56	Remaining Commission to Next Split Threshold
\$10,160.44	Commission to Brokerage

#### Learn more about Commission Split Thresholds here $\rightarrow$

**See true value of broker payable when it's negative** When the Earnest Money Held is greater than the broker net payable, CDAs will now reflect the appropriate negative amount.

Phone: 310-555-5555 Email: carol@pape	rlesspipeline.com
Commission Disbursement	Authorization
Property Address: 2911 W. 24th Place	e Los Angeles CA 90025
Buyer: Craig Stanley	Seller: Joan Burton
Acceptance Date: October 13, 2021	Closing Date: November 30, 20
Sale Price:	\$792,000.00
Gross Selling Commission:	\$23,760.00 (3% of sale price)
Transaction Gross Commission:	\$23,760.00 to Home Realty
Earnest Money Deposit:	\$2,500.00 (withheld by Home F
Payables (including commissions ar	nd agent fees)
Home Realty	-\$199.97
Quincy Grosso	\$15,519.97
EXP Realty 123 Main Street	\$5,940.00

Learn more about Managing Commissions here  $\rightarrow$ 

August 29, 2021

**Fresh**, **new look**: Pipeline has gotten a facelift! You'll still see all the features you know and love in their same places, but with updated styling, coloring and other modern enhancements. Take a look around to check out all the new feels.

**Bump "Calendar Day" due date calculations to the next business day:**In addition to automatically calculating task due dates based on calendar days or business days, you can now calculate due dates by calendar days, but bump the due date to the next business day if it falls on a weekend. Select "Calendar Days (due business day)" for any tasks that need that calculation.

Based on Status		Based on Label					
Listed	<b>X</b> -	Residential	<b>X</b> -				
Based on Side							
Listing	X -						
Automatically ap	pply to tr	ansactions in all locati	ons				
ocument Names or T			ons				
ocument Names or T			ons	) <b>æ</b> (	Due	4	Calendar Days (due
Automatically approximation of the second se	asks to T		ons	] 臣( 臣(	Due after	4	Calendar Days (due · Calendar Days
ocument Names or Tr Listing Agreement Seller's Property Disc	asks to T		ons	] ∎<			
ocument Names or T isting Agreement	asks to T		ions				Calendar Days Business Days Calendar Days (due

#### Learn more about Due Date Calculations here →

**Send closing package docs or other transaction docs as a single zip file**. When sending docs from a transaction, you can now send them as a link to a single zip file. When drafting your message, add yourself or others as a recipient, select the docs you'd like to send, then check "Send docs as a zip file link" before sending. The email will contain a link to the resulting zip file which can be forwarded to share or clicked to download and store.

Make this note private (in Notes & Sent Emails below)	Append incomplete tasks to message
Send me a BCC (blind copy) of the message	Append completed tasks to message
Save this message as a reusable template	Append overdue tasks to message
Cancel Attached Docs Send docs as zip file link	Preview Message Add Not
Attach this transaction's coversheet	
Listing Agreement 0.1 MB Addendum 0.2 MB Seller's Disclosure 0.4 MB	
🚺 🚺 🚺 Document Name ≑	Added On      Reviewed      Entered      Entered
<ul> <li>Listing Docs – visible to listing agents on this transaction and office staff</li> </ul>	
	22 hrs ago
For Br Listing Agreement	- 22 ms ugo
For Br Listing Agreement     Addendum	= 22 hrs ago

Learn more about Sending Docs as a Zip File here →

Save up to 8 Transaction List shortcuts: The limit on how many time-saving Transaction List

shortcuts you can save has been increased from 5 to 8. Use these shortcuts to store any search or sort you run regularly, then run the search with just a click later. After running a transaction search/sort in Pipeline, click "Shortcut" to save it to your "My Shortcuts" menu.

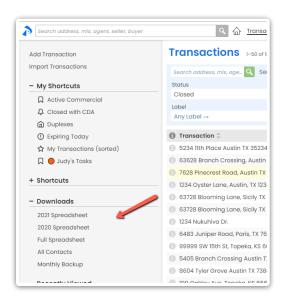
Search address, mls, agent Q Optic	ons 🔺	Sort 🔻 Columns 🔻	Download 🔻	Add	Shorto	ut				
Status		Searching by Update	d On			Side			Location	
Any Status →	*	This Week		•	×	Any Sid	e →	-	Any Location -	- <del>-</del>
Label		Commissions				Checklis	t Status			
Any Label →	-	Commissions →			•	Any Che	ecklist →	-	Search Tr	ansactions
) Transaction ≑				Status			Complete	Agents	Location	Close Date 🌲
427 April Release			L+B Residential	Active			6/41	25	Jupiter, FL	May 31, 2020
Carolle Commission January 2018			I.P. Commercial	Lanca	Contro	-	0/11	-0	Austin Elsow	Ise 15 2019

#### Learn more about Saving Custom Searches & Sorts here →

Automatically reference the More Info field in messages: The More Info field is now an auto-fill tag available to be inserted into reusable message templates. Adding this or other fields to message templates automatically inserts transaction-specific information from the field into the message whenever the template is used to send a message from a transaction. This allows you to effortlessly create very personal and custom messages with a single click. Most customers build (and share!) libraries of wonderfully elaborate messages using bothstandard and advanced auto-fill tags.

Learn more about Autofill Tags here  $\rightarrow$ Learn more about Message Templates here  $\rightarrow$ Learn more about Sharing Message Templates here  $\rightarrow$ 

**Optional date fields included in transaction downloads:** If you've enabled any of the optional transaction date fields / trigger dates from the Company Settings page, those fields will now be included in transaction downloads.



Learn more about Optional Transaction Date Fields / Trigger Dates here →

"Fax/Other" field label renamed: Heads up that the "Fax / Other" field label you used to see in the License/Fax/Other section of Manage User profiles has been changed to "Other (Fax #, Team name, etc.)". Only the label has changed, so you can continue to store fax number or any other info in that field, as desired.

<ul> <li>License # d</li> </ul>	ind Other In	10	
License #			
B658481			
Other (Fax #,	Team name	e, etc.)	
415-555-456	35		
More Info			
			,

Learn more about Editing User Profiles here  $\rightarrow$ 

Admins without Delete permissions can no longer delete docs while merging: Heads up that we've fixed an obscure bug where admins with the "View All Transactions" permission, but without "Delete docs" permissions could elect to "Delete docs after merge" when completing the merge docs process. Without the "Delete docs" permission, they will no longer be able to do so.

#### **COMMISSION MODULE**

**Easy access to Total Commission and Lead Source:**When managing commissions, you'll now see the Total Commission and Lead Source fields displayed on the left of the page.

Search address, mis, agent, seller, buyer	् ि Transactions Tasks Unas
Update Commissions	Update Commissions
$\leftarrow$ Go back to 90100 Oakley Ave., Topeka, KS	Escrow / Title
Total Commission	Escrow / Title Role Company / Adc
\$3,000.00	Escrow * Escrow 123
Lead Source	
Buyer: Newspaper Ad Seller: Trulia	Sale Info
Admin Info	Buyer's Name
Referred by Jack Tinker	John Fleming
Kelened by Suck Tinker	Sale Price
	ſ

Learn more about Managing Commissions here →

June 13, 2021

**Filter Usage by Agent Report by date range:**Pull your team's Pipeline activity based on any date range you specify. Pre-set date periods still exist to continue to allow you quick and easy access to activity for those common date ranges.

	Usage by Agent	
nancials	Report Period	rt period and click "Download o download a report spreadsheet.
<ul> <li>Aggregate Performance</li> <li>Commission &amp; Closings</li> </ul>	Custom Date Range	
■ ■ Listing Inventory Report ▼ Pending Inventory Report	Last 60 days Last 90 days	
Pending Commissions	2021 2020	
Agent Commissions	2019 2018	
Agent Production	2017 2016	
count Stats		
Total Usage		

Learn more about the Usage by Agent Report here →

**Prominently display your Admin contact's phone number in Pipeline:**Add your main admin's phone number under Company Settings. It will then be displayed prominently on the left menu of the Home page where your agents will have easy access to it and your admin.

Search address, mls, agent, seller, buyer	🔍 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference
COUTES IS FOR CLOSERS REGLITY, INC.	Announcement from your admin: Transactions Assignments: Jody Robert Claire Hello! This announcement area <u>will appear</u> for all users in y announcement on the <u>Company Settings page</u> .
☆ Emails Received Last Year	
- Recently Viewed	Search Active Trans
9999 Oak Ave., Topeka, KS 66604	
<u>123 Main Street – 1/13 test</u> 123 Main Street	Q
123 Main St.	
123 Zapier Street, Albany, OR 97321	Transactic
Admin & Support	2 Closing In
Kristian Keane 2.0 kristian@paperless	
(555) 555-5555	3199 Oak Ave, Topeka, KS 66604
Your Info 🥒	9999 Oak Ave., Topeka, KS 66604
Hollis Holcomb	View All 2 Transaction

#### Learn more about Admin & Support Contact info here →

### **COMMISSION MODULE**

**Manage off-the-top deductions:** Deductions can now be taken off-the-top (OTT) of commissions (before broker/agent splits) when managing commissions on a transaction. This will allow the broker and agent gross commissions to consider those deductions and accurately reflect their true amounts. These OTT deductions can be a flat dollar amount or based on a percentage of sales

price or gross commission. Like other deductions, you can set these OTT deduction amounts to have default values or enter them at the time of CDA generation. OTT deductions may be paid to the broker, agents, or external recipients and will be reflected on all appropriate reports.

Search address, mis, agent, seller, buyer	Transaction	s Tasks Unassigned Unreview	ed Reports Reference		ĉ	📱 Add Transaction 🛛 🤗 Help 🔅 Hollis H.	
	Manage Co	nmissions					
✿ Manage Commissions ← Go back to 123 Main Street	Escrow / Title						
Transaction Commission Summary	Escrow / Title Role Escrow	Company / Address	Name Mister Turtle	Email * hollis+turtle@paperless	Phone 2223332222	Fax / Other	
3%							
	Sale Info						
	Buyer's Name						
	Smith						
	Sale Price \$300000.00			*			
	Commission Basis Sale Price	*					
	Sale Price						
	Listing Side						
	Commission						
	3%	* % \$					
	Referral Commission						
	1%	* % \$					
	This is an in-house	referral					
	Special Fee						
	1%	* % \$					
	Enter off-the-top dedu	tions 👻					
			Cale	ulate & Continue			
	Broker / Agent G						
	Distribute Listing	Commission:					
	1 Allocate sales volu						
			Calar Maluma	Linit			

#### Learn more about Off-the-Top (OTT) Deductions here →

**Client Fee details re-positioned on CDAs:** When client fees exist on a CDA, they will now be itemized in the Commission Disbursement Authorization section and reflected as a single payable amount in the Payables section.

COFFEE IS FOR CLOSERS REALTY, INC.	Coffee is for Closers Realty This is my new address. Phone: 1011011101
Commission Disburseme	ent Authorization
Property Address: 123 Main Stree	et
Buyer: J. Smith	Seller:
Acceptance Date:	Closing Date:
Sale Price:	\$350,000.00
Gross Selling Commission:	\$10,500.00 (3% of sale price)
Transaction Gross Commission:	\$10,500.00 to Coffee is for Closers Realty
Transaction Fee to Coffee is for Closers (paid by seller)	rs Realty \$150.00
Escrow	
Company: Wild Escrow	
Officer: Monta	Email: monta@flemingescrow.com
Phone: 510-555-5900	Fax / Other: 222-555-1213
Payables (including commission	is and agent fees)
Coffee is for Closers Realty	\$1,696.76
Pahart [Pah] Coffaa Good	¢A 476 60

Speed switch between \$ and % when managing commissions:Love keyboard shortcuts that help

you breeze through your input process? When you'd like to change the mode of any \$ / % toggle field on the Manage Commissions page, include the symbol when entering the number (e.g., \$225 or 75%), and the system will switch modes automatically. Give it a try!

Search address, mls, agent, seller, buyer	् 🏠 Transactions	Tasks Unassigned Unreview	ed Reports Reference		🖬 Add Tran	saction <mark>?</mark> I
	Manage Con	nmissions				
<ul> <li>Manage Commissions</li> <li>Go back to 123 Main Street</li> </ul>	Escrow / Title					
Admin Info Some default admin	Escrow / Title Role Escrow	Company / Address	Name Mister Turtle	Email hollis+turtle@paperlesspipeli		ax / Other
info	Sale Info Buyer's Name					
	Smith Sale Price					
	\$300000.00 Commission Basis			*		
	Sale Price	•				
	Listing Side Commission	* % \$				
	Referral Commission 0%	* % \$				
	This is an in-house r	eferral				

#### Learn more super user tips & tricks here →

**Commission split thresholds updated to be based on Close date:**The system will now determine whether a multi-tier commission split threshold has been reached based on the Close date of a transaction rather than the date you're processing the commissions.

#### Learn more about managing multi-tier commission splits here $\rightarrow$

**View CDA status on transaction downloads:**Your transaction download reports now include a "Has CDA" column so you can easily see which transactions have had their CDAs generated and help you determine if action needs to be taken.

#### Learn more about downloading transaction spreadsheets here $\rightarrow$

**Escrow/Title contact and company info added to Commissions & Closings report**- The Escrow/title company contact information that's present at the top of the page while Managing Commissions is now included as the furthest right column on the Commissions & Closings report. This addition will allow you to more easily sort, filter, and report on commissions data by Escrow/Title company.

Learn more about the Commissions & Closings Report here  $\rightarrow$ 

## February 28, 2021

No more forgotten attachments: When sending a message from Pipeline, the system will warn you if you've mentioned you'll be attaching a doc but haven't attached one.

Contransactions Tasks Unassigned	Unreviewed Reports Reference	
Agent Blue	Admin Bluee Hollis Holcomb Jill-who has a really long fir Agent-who h Monta Fleming Monta - VAMC Flowery Rachel McWhirter Test Agent	Carol Francis Jane Smith Kristian Keane 2.0 Monta Garden Monta-ViewAllAdminOnly Blue Sample Account
Send to an external email address <b>O</b> Enter email addresses		
Subject C Addendum 1 Message At Hi Dorothy. Please see the at Send Withou		
Options Make this note private (in Notes & Sent Em Send me a BCC (blind copy) of the messag Save this message as a reusable template Cancel Attached Docs		Append incomplete tasks to message Append completed tasks to message Append overdue tasks to message

### **COMMISSION MODULE**

View itemized deductions on key reports: Include a breakdown of deduction amounts on the Agent Income and Commissions & Closings reports by selecting the "Include Deduction Details" option when running the reports. To continue to view deduction totals only, leave the option unchecked.

#### Search address, mls, agent, seller, buyer 🔍 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference **Commission & Closings** Location Company-wide • 🏽 Aggregate Performance Closing period -★ Commission & Closings Last Month E Listing Inventory Report Side **Pending Inventory Report** • Any Side $\rightarrow$ Sending Commissions Label 👗 Agent Income • Any Label $\rightarrow$ E Agent Commissions Include Deduction Details R Agent Production Download Report ະ Lead Sources Total Usage Usage by Agent

Learn more about commission module reports here  $\rightarrow$ 

**Calculate Fees & Deductions based on a percentage:**Agent Fees, Client Fees, and Deductions can now be based on a pre-defined percentage. When setting up fees based on a percentage, specify the default amount (if applicable) along with the desired percentage basis for each fee (e.g., sale price, gross commission, distributable commission, etc). When managing commissions on transactions, your specified basis will be used to calculate the fee amount.

Search address, mis, agent, seller, buyer	🔍 🏠 Transactions Tasks Unassign	ed Unreviewed Reports R	eference		
	Manage Agent Fees				
- People	Agent Fees				
Manage Locations	Fee Name	Default Fee	Amount	Fee % Basis	
🍰 Manage Users	Marketing Fee	1%	% \$	Agent Gross	× -
- Customize	Unused fee	s 🕇	% \$	Select %	~
Company Settings	Unused fee	s	% \$	Select pasis	-
<ul> <li>Transaction Statuses</li> <li>Transaction Labels</li> </ul>	Unused fee		% \$	5 . ft % Basis	Ŧ
Document Labels	Unused fee	s	% \$	Select % Basis	~
Document Names	Unused fee	\$	% \$	Select % Basis	-
ese Lead Sources	Unused fee	\$	% \$	Select % Basis	~
- Templates	Unused fee	s	% \$	Select % Basis	-
Business Holidays Checklists	Unused fee	\$	% \$	Select % Basis	Ŧ
V Break Apart Docs	Unused fee	\$	% \$	Select % Basis	Ŧ
- Financials	Unused fee	\$	% \$	Select % Basis	Ŧ
🔹 Agent Fees	If you run out spaces for fees, click Sav	e to add more.			
<ul><li>Client Fees</li><li>Deductions</li></ul>	Save Settings				

Learn more about managing fees and deductions here  $\rightarrow$ 

Search address, mls, agent, seller, buyer	C C Transactions Tasks Unassigned Unr	leviewed Reports Reference
	Gross Disbursement	\$7,500.00
	Tammy Sheldon (sample user) Agent's gross commission	\$6,750.00
Transaction Commission Summary 3% listing / 3% buying	Contribution to broker's gross	\$750.00
Admin Info This is a sample transaction. When you're ready to delete this transaction, click "Delete this transaction" from the bottom right corner of this page.	<b>Wingman Group</b> Broker's gross commission	\$750.00
Assistants on this transaction: Jonathan Carey (sample user)		Edit Prev Step
	Fees & Deductions	
	Broker's Fees & Deductions	
	2 Tammy Sheldon (sample user) - Fee	es & Deductions
	Marketing Fee	1% %
	Tax	\$ % Basis: Agent Gross
		Calculate & Continue
	Co-op Brokerage Commission & Special Instruction	ns
	Cooperating Brokerage	
	Amount \$	
	Company name / info	
	CDA instructions (to be shown above Paya	ables)
	CDA instructions (to be shown below Paus	
	CDA instructions (to be shown below Paya CDA instructions liettom	ables)

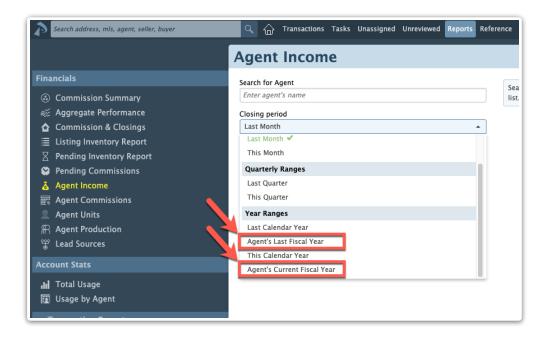
**Auto-calculate sales volume:** When there is more than one agent on the side of a transaction, Pipeline can automatically allocate sales volume to match the agents' split of commission. Turn this feature on from the Company Settings page if it fits your company's needs.

Search address, mls, agent, seller, buyer	Carl Carl Carl Carl Carl Carl Carl Carl	asks Unassigned Unreviewed	Reports Reference				
	Calculated Commission	Amounts					
	Commission Type			Listing			
	Gross Commission:			\$5,000.00			
	Franchise fee:			\$10.00			
Admin Info AGENT SERVICES: (Next to the corresponding	Net (Gross – Referral – Franch	ise fee):		\$4,990.00			
service, add Y for Yes or N for No): Gift Delivery – Yard Sign Delivery –	1 Next, we will help you distribute the broker/agent commission of \$4,990.00.						
Close Out in MLS – _				Edit Prev Step			
	Broker / Agent Commission	Disbursement					
	Distribute Listing Com	mission:		\$4,990.00			
	1 Distribute listing gross I	between 2 agents					
	Phil Dunphy		50%	* %			
	Charles Leifer		50%	* \$			
	Allocate sales volume an	nd units					
			Sales Volume	Unit			
	Phil Dunphy		\$50000.00	0.5			
	Charles Leifer		\$50000.00	0.5			
	3 Specify agent / brokerag	ge splits					
	Bhil Dunnhu	Brokerage	Agent	* 0/ dt			
	Phil Dunphy Charles Leifer	%	%	* % \$			
	Charles Leffer	<i>T</i> 0	70	% ₩			
			Cal	culate & Continue			
	Fees & Deductions						

Learn more about managing commissions here  $\rightarrow$ 

**Run Agent Income report by fiscal year:** "Last Fiscal Year" and "Current Fiscal Year" date range options allow you to run the Agent Income report based on an agent's fiscal year.

Learn more about the Agent Income Report here  $\rightarrow$ 



**Easily identify docs that correspond to completed tasks:** Easily spot which doc has fulfilled a task on a transaction. Hover over a task name within a transaction's checklist to highlight the matching doc. In cases where more than one doc may match, utilize versioning in your naming convention or use Pipeline's Document Labels for easy identification of the final doc.

Search address, mis, agent, seller, buyer	🔍 🎧 Transactions Tasks Unassigned Ur	reviewed Reports Reference	T Add T	Fransaction 🤗 Help 🌸 Hollis H
<ul> <li>View Transaction</li> <li>Edit Transaction</li> </ul>	1850 N Avalon Street			
Upload Docs           Assign Docs           New Offer           Transaction History           Received Emails (0)	MLS #: 9185091850 Label: Residential Status: Listed Side: Listing Location: Old Pine	Listed On: Accepted On: Closes On:	Sep 2, 2020 Oct 13, 2020 Oct 28, 2020 Oct 27, 2020	coversheet
Download Transaction Checklists 0/7	Seller: Smith Earnest Money Deposit Date: Oct 21, 2020 Inspection Due Date: Oct 7, 2020			
- Listing Checklist Mold Disclosure HOA Listing Agree	More Info Lock Box: Year Built: 2004			
Seller's Authorization to Idvertise Keybox Authorization by To ant Seller's Disclosure Form 34Z	Listing Agents ③ Elijah McCoy	🔀 hollis+elijah@paperlesspipeline.com	555-555-5555	
Add doc name or task	👔 🔝 Document Name 🗘	Upload Docs	Added On	Q Search Docs
	Listing Docs - visible to listing agents on this transe     Form 34Z     Hud Settlement Statement     Listing Agreement	ction and office staff	<ul> <li>27 mins ag</li> <li>28 mins ag</li> <li>27 mins ag</li> </ul>	• •
	Seller's Disclosure     Sale Docs - visible to listing and selling agents on the	is transaction and office staff	🥏 27 mins ag	
	Closing Docs Counter Offer Deed of Release		<ul> <li>28 mins ag</li> <li>28 mins ag</li> <li>28 mins ag</li> </ul>	
	Purchase Agreement     Title Report final     Buyer Docs - visible to selling agents on this transac	tion and office staff	<ul> <li>28 mins ag</li> <li>28 mins ag</li> </ul>	
	<ul> <li>Residential Purchase Contract</li> <li>Termite Inspection</li> </ul>		<ul> <li>27 mins ag</li> <li>28 mins ag</li> </ul>	
				Delete this transaction

Learn more about Smart Doc Name Matching here →

# September 13, 2020

Set tasks to only be visible to certain individuals or groups:Let your @mentions control who sees tasks. Our new @mention visibility setting allows you to set tasks to only be visible to the person or people you've @mentioned. Use it along with the other visibility settings to make sure your team only sees tasks intended for them.

Manage Locations     Location       ▲ Manage Users     Iod Pine       - Custonize     Cockils Name*       ▲ Company Settings     Internation Labels       Transaction Labels     Image Locations       Document Names     Residential       ▲ Concent Names     Internations in all locations       ■ Concurrent Names     Internation Labels       ■ Concurrent Names or Tasks to Track     Internation Labels       ■ Content Names or Tasks to Track     Internationally apply to transactions in all locations       ■ Content Names or Tasks to Track     Internationally apply to transactions in trail locations       ● Content Names or Tasks to Track     International Content Names or Tasks to Track       ● Content Names or Tasks to Track     International Content Names or Tasks to Track       ● Content Names or Tasks to Track     International Content Names or Tasks to Track       ● Content Names or Tasks to Track     International Content Names or Tasks to Track       ● Content Names or Tasks to Track     International Content Names or Tasks to Track       ●	Search address, mls, agent, seller, buyer	् 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference	📷 Add Transaction 🤗 Help 🔅 Hollis
Manage Locations     Location       Manage Users     Location       Company Settings     Listing Checklist       Transaction Labels     Isseed on Salus       Document Labels     Isseed on Salus       Document Names     Residential       Document Names     Residential       Bosiness Holidays     Automatically apply to transactions in all locations       Business Holidays     Document Labels       Document Labels     Listing       Document Names     Residential       Manage to Salus     Sale       Statings Holidays     Automatically apply to transactions in all locations       Document Labels     Listing       Bosiness Holidays     Document Labels       Cation Salus     Document Labels       Listing Agreement     Automatically apply to transactions in all locations       Automatically apply to transactions     Document Hanes or Tasks to Tack.       Reset on Disblet or assign Isaks to Indevice using mention     Itality agreement       V Freak Apart Docs     Listing Agreement       Listing Agreement     Statisk Stibility:       Geneticion Types     Itality Agreement       Commission Basis     Holida task       State Kress     Holida task       Commission Basis     Holida task		Edit Listing Checklist	
▲ Manage lusamine     Old Pine       - Customize     Cicklins Name       ▲ Company Settings     Uisting Checklist to transactions       ■ Transaction Statuses     I Justing Checklist to transactions       ■ Document Labels     ● Automatically apply this Checklist to transactions       ■ Document Labels     ● Automatically apply to transactions in all locations       ■ Document Names     ■ Automatically apply to transactions in all locations       ■ Based on Status     ■ Automatically apply to transactions in all locations       ■ Content Names     ■ Automatically apply to transactions in all locations       ■ Checklist     ■ Automatically apply to transactions in all locations       ■ Based on Status     ■ Content Names or Tasks to Track       ■ Checklist     ■ Automatically apply to transactions in all locations       ■ Checklist     ■ Automatically apply to transactions in all locations       ■ Checklist     ■ Checklist constructions in all locations       ■ Checklist     ■ Checklist       ■ Checklist     ■ Checklist       ■ Checklist     ■ Checklist       ■ Checklist     ■ Checklist	- People	Checklist Template Information	
	Manage Locations	Location *	
Company Settings       Listing Checklist         I Transaction Labels       I Automatically apply this checklist to transactions         Document Names       Residential         Document Names       Residential         Listing R ← Residential       K ←         Listing Agreement       Firstak Apart Docs         Listing Agreement	🎎 Manage Users	Old Pine 👻	
Company Settings     Image: Company Settings       Image: Transaction Labels     Image: Company Settings       Image: Company Settings     Image: Company Settings       Image: Company Setings     Image: Company Settings	- Customize	Checklist Name*	
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#### Learn how to Set Task Visibility here →

Make task names easier to read by hiding @mention text:Click the new option to hide @mention text from your task names, keeping them clean and easy to read. The new option appears at the top of your Tasks page and under the checklist gear icon on each transaction.

Search address, mis, agent, seller, a	buyer	<u>्</u> २ ४	Transactions Tasks Unassigne	d U	nreviewed Reports Reference		🛃 Add Tr	ansaction 🤗 Help	🔅 Hollis H
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Learn how to Hide @mention Text here  $\rightarrow$ 

# August 6, 2020

Mark tasks as complete faster: Admins can now check tasks off directly from the *Tasks* page. The checkbox works the same as it does on transactions.

Overd	due and Upcomi	ng	Tasks Showing 1	201-1208 of 1208 tasks.			
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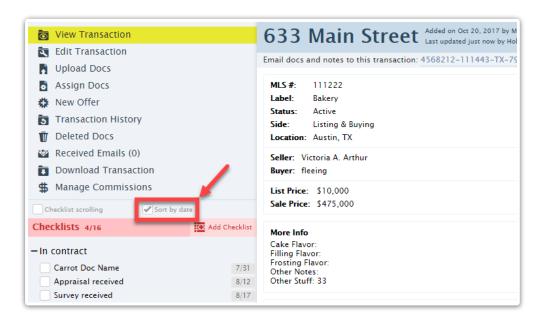
#### Learn how to check tasks on the Tasks page here →

**Filter tasks by agents:** View only the tasks that belong to a certain agent while managing what they need to complete. Enter the agent's name into the *Agent Name* field on the *Tasks* page to work from that ideal list.

Over	due and Upcon	ning Task	S Showing	g 1-50 of 1212 tasks	i.			
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Sat 3/29	Lead-based Paint Disclosure	Latest			Standard Listing Checklist	Anyone	Active	2

Learn more about filtering tasks by agent here  $\rightarrow$ 

**View transaction tasks in the order they're due:**Find the task you're working on faster by using the new [Sort by Date] option. Check the option for the tasks to be ordered by due date on every transaction. Uncheck the option for the list to return to it's default order.



#### Learn more about sorting tasks by due date here $\rightarrow$

Plus other minor fixes and improvements throughout the system.

# July 12, 2020

New Home page steers you where you need to go:Pipeline's new *Home* page now includes information that will allow you to quickly determine which area needs your greatest attention. Expandable areas allow you to view details that are critical for you to know each time you login to Pipeline.

Search address, mis, agent, seller, buyer		🔍 🏠 Transactions Tasks Unassigned	Unreviewed Reports Referen	œ		🙀 Add Transaction	🕐 Help 🔹 Hollis H
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#### Learn more about the new Home page here $\rightarrow$

**Company-wide announcements:** Pipeline's new announcement feature allows you to post an announcement to be displayed on the *Home* page to all the users in your account. The reader can hide the announcement once it has been read, and it will re-appear if the message is updated. Master admins can update the message from the [Company Settings] page.

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IS FOR SERS , INC.	Announcement from your admin: Need to post an announcement? This announcement area will apper you add or update an announcement on the <u>Company.Settings.seas</u>	
d This Week		
(	Search Active Transactions	
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**Track incoming emails sent to transactions:** Quickly identify which transactions have received email messages during your specified time period using the new *Email Received* search option.

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Save the search as a custom shortcut for regular, easy access from your*Home* page and *Transactions* page left menus.

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#### Learn more about creating Custom Shortcuts here →

### February 24, 2020

#### Estimate potential and future revenue in an instant:

- The PENDING INVENTORY REPORT allows you to forecast future commissions for specified time periods. It includes sales and commission figures for all your pending transactions, and can be filtered by side, Transaction Label, and date range.
- The LISTING INVENTORY REPORT allows you to closely monitor the health of your business and track market changes by reporting your listing side inventory for a specified period. The report includes the number of listings, list price volume, and average list price.

#### Learn more about the Pending Inventory Report here $\rightarrow$

Learn more about the Listing Inventory Report here  $\rightarrow$ 

### December 20, 2019

**Download search results to manage transaction data offline:**Download spreadsheets of your custom searches and sorts to fully manage and present transaction information, including filtering, sorting, adding totals and subtotals and more. Click the [Download] button on the Transactions page to choose from downloading either displayed fields or all transaction fields.

Learn more about downloading search results here  $\rightarrow$ 

Learn fast and easy spreadsheet tips & tricks here →

### October 20, 2019

**Track More Dates and Use Them to Trigger Checklists:** Several new date fields allow you to track important dates on transactions. Enable any of the new fields from your Company Settings

page. Once a date is turned on, it will also be available as a trigger date for automatically assigning checklists.

Learn more about enabling date fields here  $\rightarrow$ 

### August 13, 2019

**Send Audio Notes & Messages** Save time by speaking your transaction notes and messages instead of typing them. Audio messages allow you to quickly record a note to yourself or send it to others. Record messages from your mobile device when you're on-the-go, from your laptop when you're in the office, or any time.

Learn how to send audio notes & messages here  $\rightarrow$ 

# 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  $\rightarrow$ 

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  $\rightarrow$ 

### 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  $\rightarrow$ 

**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  $\rightarrow$ 

**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  $\rightarrow$ 

# 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  $\rightarrow$ 

# 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  $\rightarrow$ 

**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.

# April 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.

Read the blog post for more info  $\rightarrow$ 

### **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.

Read the blog post for more info  $\rightarrow$ 

# October 8, 2017

**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  $\rightarrow$ 

### **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  $\rightarrow$ 

### June 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  $\rightarrow$ 

**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  $\rightarrow$ 

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  $\rightarrow$ 

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  $\rightarrow$ 

### **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.

# April 2, 2017

**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.

Read the blog post for more info  $\rightarrow$ 

#### **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" drop-down 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.

# January 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  $\rightarrow$ 

Search address, mls, agent, seller, buyer	् 🏠 Transactions Tasks Unassigned Unrevi	ewed Reports	Reference		
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- People	Agent Fees				
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