

Paperless Pipeline Pro Webinar

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Scheduled Messaging

April 19, 2023

This week we'll cover all the glorious details related to automating both your message templates and transaction messages to ensure your recipients get the right messages when they most need them.

 15:27

Message Template Magic

April 12, 2023

This week we'll go over all the magical features, tips, and practices that help you create useful and time-saving message templates. This session is a great pre-cursor to next week's webinar covering Schedule Messaging.

 20:24

Did You Know? Transactions Edition

April 5, 2023

This week we'll be revealing the transaction-related features you're often surprised to learn exist in Pipeline. Come see which of these time-savers will become part of your daily routine.

 17:17

Did You Know? Reporting Edition

March 29, 2023

Pipeline offers several reporting options that people are often surprised to learn about. Come discover which of these reporting tools will fit perfectly in your Pipeline toolbox!

 15:33

Did You Know? Messaging Edition

March 22, 2023

There are a handful of features related to messaging in Pipeline that people are often surprised to learn exist. Come see which of these time-savers you can stash into your bag of Pipeline tricks!

 13:50

Getting Ahead with Type-Ahead

March 15, 2023

Type-ahead allows you to find or select information from lists much more quickly than reading through the list of items, especially when that list is long. Come find out where type-ahead lists live throughout Pipeline (several you're likely not aware of) so you can start saving time throughout your day.

 15:35

Emojis: An Organization Tool

March 8, 2023

This week we'll cover the different options in Pipeline that control who can view tasks in the system.

 20:55

Fan Favorites

March 1, 2023

From small conveniences that improve your day-to-day workflow to huge time-savers, this week we'll be covering the features you regularly tell us you ♥ in Pipeline.

🕒 18:39

Controlling Who Can See Tasks

February 22, 2023

This week we'll cover the different options in Pipeline that control who can view tasks in the system.

🕒 11:52

Creative Ways to Use Announcements

This week, we'll cover several creative options for informing, directing, and educating your team via Pipeline's *Home Page Announcement*. Be sure to bring any creative ways you use *Announcements* to share with the group! (February 15, 2023)

🕒 11:17

Enabling Agents (in the good way)

February 8, 2023

This week we'll cover how you can set your agents up to help manage different aspects of your office's transaction workflow, giving them more autonomy (if desired), and saving admins' time.

🕒 18:42

Recovery Options

March 31, 2021

This week we'll go over your options for retrieving offline, deleted, or overwritten data in Pipeline.

🕒 10:55

Adding Users to Pipeline Without Giving them Access

March 24, 2021

This week we'll cover how you can add users (typically agents) to your Pipeline account that you don't want to be able to log in (either temporarily or permanently).

 10:46

Getting Your Important Pipeline Information Noticed

March 17, 2021

Come learn how you can make your important Pipeline information stand out so deadlines and requirements don't get overlooked.

 20:01

Create Unlimited Email Aliases to Support Special User Scenarios

March 3, 2021

This week we'll cover how some email systems allow you to create email address aliases that can then be used to support certain user needs in Pipeline.

 17:15

When It's Time to Print

February 24, 2021

Need to adjust system email settings to better fit your team's workflow? This week we'll go over the various system emails that exist and review the options related to them.

 17:15

What Agents See

February 17, 2021

Come join us this week as we take a look at Pipeline from an agent's perspective, viewing pages as they see them.

 18:50

System Email Options

February 10, 2021

Need to adjust system email settings to better fit your team's workflow? This week we'll go over the various system emails that exist and review the options related to them.

 11:48

Managing Buyer Offers

February 3, 2021

This week we'll cover the different options for managing your buyers' offers in Pipeline.

 7:18

Viewing Recent Activity Throughout Pipeline

January 27, 2021

This week we'll take a deep dive into Pipeline's full ad hoc reporting options and explore how they can benefit you and your team.

 18:09

Ad Hoc Searching and Reporting

January 20, 2021

This week we'll take a deep dive into Pipeline's full ad hoc reporting options and explore how they can benefit you and your team.

 24:34

Tracking User Productivity

January 13, 2021

This week we'll explore the visibility you have into your team's productivity in Pipeline.

 8:46

Top 5 Agent Features

January 6, 2021

Come learn about the most popular agent-productivity-boosting features in Pipeline!

 16:12

New Reverse Doc Name Matching

October 21, 2020

This week we'll go over the new feature that allows you to easily identify docs that correspond to completed tasks on transactions. We'll also cover tips for getting the most out of that feature.

 8:00

Using Checklist Auto-fill Tags

October 14, 2020

Since there were a number of questions related to the checklist auto-fill tag portion of last week's webinar, this week we'll dive deeper into how to utilize those auto-fill tags in messages.

 11:41

Tracking Key Dates and Timelines in Pipeline

October 7, 2020

This week we'll dive into how to setup, sync, and share key dates and timelines in Pipeline.

 9:48

Easy on the Eyes

September 30, 2020

Pop in this week to learn several ways to keep your Pipeline data as clutter free and easy to wield as possible.

 11:35

Classifying Transactions

September 23, 2020

Need to designate certain transactions for certain admins, flag them based on agent tenure, or otherwise categorize them beyond property type? This week we'll explore a creative method of classifying your transactions.

 12:14

Top 5 Checklist Tricks

September 16, 2020

Find out the top 5 checklist tricks that'll help save you and your team time and clicks.

 16:54

The 10 Biggest Time Savers in Pipeline

September 09, 2020

This week we'll highlight the top 5 tools in Pipeline that can save you and your team huge chunks of time every day.

 23:04

Recent and Upcoming Features

September 02, 2020

Your Pipeline Pro weekly webinars are back from summer hiatus! On our first week back, we'll be catching you up on both upcoming and recently released tools and time savers in Pipeline.

 9:36

New Home page + Sneak peek of upcoming features

July 13, 2020

Come learn about how your new Home page works to help you identify the information you need to work on first. We'll also be going over new features that are just around the corner!

 22:26

Pro User Spreadsheet Tips & Techniques

May 27, 2020

On our last spreadsheet webinar we covered Macros, subtotaling, filtering, and much more (check that out!). This week we'll cover additional game-changing tips & techniques (including some advanced ones) that will allow you to produce, adjust, and present the exact Pipeline data you need quickly and efficiently.

 29:16

Effective ways to utilize the More Info field

May 20, 2020

This week we'll go over several creative and practical examples of how the More Info field can help improve your efficiency in Pipeline. Be sure to pop in!

 9:14

Custom shortcuts - Why they're your new best friend

May 13, 2020

If you haven't fallen in love with the new custom shortcuts already, come learn why you will! We'll be going over ways to gain the most use out of them as well as look ahead to new, related

enhancements.

 14:35

Sort of fun

May 6, 2020

Come learn how certain sort features in the system can help you get right to the info you need or make info easier for your team members to find. We'll include some power-user options you may not be aware of.

 11:11

Getting the most use out of statuses throughout Pipeline

April 22, 2020

Come learn how to put statuses to work in ways that save time and improve workflow for all members of your team.

 14:26

Syncing some or all tasks to calendars

April 8, 2020

It's not all or nothing! Come learn your options for syncing some or all of your Pipeline tasks to your favorite calendar.

 10:30

Understanding Listing & Pending Inventory Reports

April 01, 2020

This week we'll go over the Listing & Pending Inventory reports, the special information they include, and how they can be valuable for your office.

 7:00

Building a custom training library for agents

March 11, 2020

Whether you need to implement initial roll-out training or ongoing training for new agents, you won't want to miss this session! You'll learn how to create custom training libraries that will help you train your team on the parts of Pipeline they need to know.

 10:03

Removing Data

March 4, 2020

Come learn when it is (and is not) appropriate to remove certain data in Pipeline and how to do it.

 7:23

Managing Commissions for Flat Fee Brokerages

February 19, 2020

Come learn how Pipeline's Commission & Reporting Module can be used to consolidate a flat fee brokerage's commission processing and streamline their workflow.

 18:15

The important DOs and DON'Ts of creating and deactivating users

February 12, 2020

Come learn how to properly create and deactivate users in Pipeline and avoid potentially significant issues.

 7:56

History: Where It Is and When You Need It

February 5, 2020

This week we'll go over the different areas to find audit trail and activity history information and identify when you'll need it.

 6:49

Advanced Usage of Manage Users

January 29, 2020

Come learn the advanced and creative options for storing and managing all sorts of information under Manage Users.

 10:27

Documenting and keeping good notes in Pipeline

January 22, 2020

Adding notes to the right places means quick and easy access to that info when it's needed later. Come learn the most relevant places to add and retrieve notes and other documentation in Pipeline.

 14:29

Creative Options for Sending Docs to Pipeline

January 15, 2020

This week we'll discuss different ways to creatively take advantage of maildrop addresses to get your docs into Pipeline. We'll also go over rules, tips, and tricks related to emailing docs into Pipeline quickly & easily.

 11:43

Getting team members the information they need

January 8, 2020

Come learn how to use the tools in Pipeline to continuously inform, communicate, and arm your team with what they need to be successful in Pipeline.

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