

Manage Transactions

Use transactions to store and track all the aspects of a listing or purchase. Once a transaction is added to your company's account, it can be viewed and edited by the transaction's agents and admins.

Introduction

A *Transaction* in Paperless Pipeline is the container for all the things related to a real estate listing or purchase being handled by your company.

It contains all the relevant dates and information, as well as *Checklists & Tasks* to help drive transactions to completion, *Documents* for history and compliance purposes, *Contacts* for quick reference and use, *Messaging* for simple, documented communication, and more!

View a Transaction

View a transaction in your company's Paperless Pipeline account.

Who Can Do This? A transaction can be viewed by in-house agents added to the transaction and admins with permission to *View all transactions* (in the transaction's *Location*).

To view a transaction:

- 1 **Find the transaction you want to view.** You can find active transactions on your [Transactions List](#), or find inactive transactions by searching for them. [Learn how →](#)
- 2 **Open the transaction** by clicking the *Transaction Name* or *Property Address*.
- 3 **View areas of the transaction** ([described below](#)).

Transaction Information

The *Info* sections at the top of the transaction display important dates and other information related to the transaction's listing, contract, or commission.

This *Information* can be entered when the transaction is **added** or **edited**.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Paperless A.

View Transaction
Edit Transaction
Upload Docs
Assign Docs
New Offer
Transaction History
Deleted Docs
Received Emails (0)
Download Transaction

Checklists + 0% ✓

Sample listing checklist

- ☐ Agency Disclosure
- ☐ MLS Data Sheet / Input Form
- ☐ Seller's authorization to advertise property
- ☐ Listing Agreement
- ☐ Seller's Property Disclosure
- ☐ Lead Based Paint Disclosure (if applicable)

Add doc name or task

Sample pending checklist

- ☐ Seller's Property Disclosure signed by buyer & seller
- ☐ Dual agency addendum (if applicable)

18 Park Street, Phoenix, AZ 85001 (sample) Added on Dec 18, 2022 by Paperless Admin
Last updated 19 hours ago by Paperless Admin

27 Days to close

Email docs and notes to this transaction: 4003-308920-TX-536333@docs.paperlessonline.com

General

Status: Pending
Label: Single Family Residential
Side: Listing

Listed On: Dec 18, 2022
Accepted On: Feb 13, 2023
Closes On: Mar 18, 2023

Seller & Buyer

Seller: Omni Homes (602) 555-0137
Buyer: Jennifer and Michael Matthews (602) 555-0138

Sale & Commission

Commission Summary: 3% listing / 3% buying

More Info

- Lockbox #1910
- Seller's prefer showings on Tuesday, Wednesdays, and Thursdays anytime between 9am and 5pm.

Admin Info (only visible to admin staff)

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.

Listing Agents

Tammy Sheldon (sample user) tammy.20015@example.com (602) 555-0134
Jonathan Carey (sample user) assistant jonathan.20015@example.com (602) 555-0135

2 Contacts

Order Added + Add Contact

Josh Jones, Mortgage joshjones@example.com (602) 555-0155
Unlimited Mortgage Company

Agents Involved

The *Listing Agents* and *Buying Agents* sections display the in-house agents and assistants added to the transaction and granted access to it.

They also display *Outside (Co-Op) Agents* who do not have access to the system.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Paperless A.

View Transaction
Edit Transaction
Upload Docs
Assign Docs
New Offer
Transaction History
Deleted Docs
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Download Transaction

Checklists + 0% ✓

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- ☐ Lead Based Paint Disclosure (if applicable)

Add doc name or task

Sample pending checklist

- ☐ Seller's Property Disclosure signed by buyer & seller
- ☐ Dual agency addendum (if applicable)
- ☐ Home inspection signoff
- ☐ Repair addendum (if applicable)
- ☐ Extension of closing addendum (if applicable)
- ☐ Commission Disbursement

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Jonathan Carey (sample user) assistant jonathan.20015@example.com (602) 555-0135

2 Contacts

Order Added + Add Contact

Josh Jones, Mortgage joshjones@example.com (602) 555-0155
Unlimited Mortgage Company

Monica Smith, Escrow officer msmith@example.com (602) 555-0145
Trusted Escrow Services

Note / Email Add Contact Merge Docs Upload Docs Search Docs

Checklists & Tasks

The *Checklists* section displays *Tasks* to be completed on the transaction, including what documents need to be uploaded, what actions need to be performed, or any other responsibilities that help drive it to completion.

Checklists can be added to transactions automatically or manually by agents and admins (with the appropriate permissions). [Learn more about Checklists & Tasks →](#)

Search address, mls, agent, seller, buyer

View Transaction

Edit Transaction

Upload Docs

Assign Docs

New Offer

Transaction History

Deleted Docs

Received Emails (0)

Download Transaction

18 Park Street, Phoenix, AZ 85001 (sample)

Admin docs and notes to this transaction: 4003-309920-TX-5381333/docs/papersessonline.com [🔗](#)

Status: Pending

Label: Single Family Residential

Side: Listing

Added On: Dec 18, 2022

Ackected On: Feb 13, 2023

Closes On: Mar 18, 2023

[coversheet](#)

Seller & Buyer

Seller: Omni Homes (602) 555-0137

Buyer: Jennifer and Michael Matthews (602) 555-0136

Sale & Commission

Commission Summary: 3% listing / 3% buying

More Info *(only visible to admin staff)*

- Lockbox #1910
- Seller's prefer showings on Tuesday, Wednesday, and Thursday anytime between 9am and 5pm.

Listing Agents

Tammy Sheldon (sample user)	✉️ tammy20015@example.com	📞 (602) 555-0134
Jonathan Carey (sample user) disabled	✉️ jonathan20015@example.com	📞 (602) 555-0135

— 2 Contacts — ⬇ Order Added ➕ Add Contact

Josh Jones, Mortgage	✉️ joshjones@example.com	📞 (602) 555-0155
Monica Smith, Escrow officer	✉️ mmsmith@example.com	📞 (602) 555-0145

Trusted Escrow Services

Note / Email
+ Add Contact
+ Merge Docs
+ Upload Docs
🔒
🔍 Search Docs

Document Name ➕ Added On ➖ Reviewed

Listing Docs – visible to listing agents on this transaction and office staff

- 📄 **Memo** Listing Agreement Feb 18, 2023 🔗
- 📄 Sellers Property Disclosure Dec 18, 2022 🔗

Sale Docs – visible to listing and buying agents on this transaction and office staff

- 📄 **Negot** Earnest Money Deposit Feb 14, 2023 🔗
- 📄 **Discd** Lead-Based Point Disclosure Feb 14, 2023 🔗
- 📄 **Ptptst** Sample Purchase Contract Feb 13, 2023 🔗

Checklists + 0%

– Sample listing checklist

- ☐ Agency Disclosure
- ☐ MLS Data Sheet / Input Form
- ☐ Seller's authorization to advertise property
- ☐ Listing Agreement 12/18
- ☐ Sellers Property Disclosure 12/18
- ☐ Lead Based Paint Disclosure (if applicable) 12/18

Add doc name or task

– Sample pending checklist

- ☐ Sellers Property Disclosure signed by buyer & seller
- ☐ Dual agency addendum (if applicable)
- ☐ Home Inspection signoff
- ☐ Repair addendum (if applicable)
- ☐ Extension of closing addendum (if applicable)
- ☐ Commission Disbursement Authorization
- ☐ Cooperating broker's commission agreement
- ☐ Buyer Preapproval
- ☐ Lead Based Paint Disclosure signed by buyer & seller (if applicable)
- ☐ Change status to pending in MLS (if our listing) 2/18
- ☐ Executed purchase contract
- ☐ Counter offer

Add doc name or task

Contacts

The *Contacts* section displays a list of third-party *Contacts* involved with the transaction.

Contacts can be added to the transaction by agents or admins.[Learn more about Contacts](#) →

[Search address, MLS, agent, seller, buyer](#)

- [View Transaction](#)
- [Edit Transaction](#)
- [Upload Docs](#)
- [Assign Docs](#)
- [New Offer](#)
- [Transaction History](#)
- [Deleted Docs](#)
- [Received Emails \(0\)](#)
- [Download Transaction](#)

[+ Add Transaction](#) ? Help @ Paperless A

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Listing Agents

Tammy Sheldon (sample user)	tammy.20015@example.com	(602) 555-0134
Jonathan Carey (sample user) (assistant)	jonathan.20015@example.com	(602) 555-0135

+ 2 Contacts

Josh Jones, Mortgage	joshjones@example.com	(602) 555-0155
Monica Smith, Escrow officer	msmith@example.com	(602) 555-0145

Note / Email
Add Contact
Merge Docs
Upload Docs
🔒

Document Name

- Listing Docs - visible to listing agents on this transaction and office staff
- Missed Listing Agreement
- Sellers Property Disclosure

Added On **Reviewed**

	Feb 18, 2023	☐	☐
	Dec 18, 2022	☐	☐

Sample pending checklist

- ☒ Sellers Property Disclosure signed by buyer & seller
- ☐ Dual agency addendum (if applicable)
- ☐ Home inspection signoff
- ☐ Repair addendum (if applicable)
- ☐ Extension of closing addendum (if applicable)
- ☐ Commission Disbursement Authorization
- ☐ Cooperating broker's commission agreement
- ☐ Buyer Preapproval
- ☐ Lead Based Paint Disclosure signed by

Checklists + 0%

Sample listing checklist

- ☐ Agency Disclosure
- ☐ MLS Data Sheet / Input Form
- ☐ Sellers authorization to advertise property
- ☐ Listing Agreement 12/18
- ☐ Sellers Property Disclosure 12/18
- ☐ Lead Based Paint Disclosure (if applicable) 12/18

Add doc name or task

Docs

The *Docs* section displays documents based on your role on the transaction. For example, if you're a *Listing Agent*, you'll be able to see *Listing Docs*, *Sale Docs*, *Public Docs*, and docs you set to *Private*.

Docs can be added to transactions by agents and admins (with the appropriate permissions).

[Learn more about Uploading Docs →](#)

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More Info

Admin Info (only visible to admin staff)

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Jonathan Carey (sample user) jonathan.20015@example.com (602) 555-0135

2 Contacts

Josh Jones, Mortgage joshjones@example.com (602) 555-0155
Monica Smith, Escrow officer msmith@example.com (602) 555-0145

Notes & Sent Emails

Tammy Sheldon (sample user) Missing Signature
The seller's initials are missing on page 8 of the purchase contract. Can you resubmit page 8?
To: Jonathan Carey (sample user)
Feb 13, 2023
Thank You.

Document Name	Added On	Reviewed
Listing Docs - visible to listing agents on this transaction and office staff		
Listing Agreement	Feb 18, 2023	☐
Sellers Property Disclosure	Dec 18, 2022	☐
Sale Docs - visible to listing and buying agents on this transaction and office staff		
Earnest Money Deposit	Feb 14, 2023	☐
Lead-Based Paint Disclosure	Feb 14, 2023	☐
Sample Purchase Contract	Feb 13, 2023	☐

Notes & Sent Emails

The *Notes & Sent Emails* section lists all notes and emails sent from the transaction.

Notes & Emails may be sent from the transaction by agents and admins [Learn more about Emailing Docs & Notes from a Transaction →](#)

Agents and admins can view the *Transaction History*, but will only see the information that is relevant to them.

Add a Transaction

Add a new transaction to start tracking it in your company's account.

Who Can Do This? A transaction can be added by admins and agents with permission to *Create transactions*.

To create a new transaction:

- 1 Click [?] **Add Transaction** from the upper right corner of any page.
Or, add a transaction using **keyboard shortcuts**, Ctrl + Alt + T (Windows) / Ctrl + Opt + T (MacOS).
- 2 Add the information you have available for the transaction (**outlined below**), then save.

Location

Select the *Location* associated with the transaction (if applicable).

The screenshot shows the 'Add Transaction' form in a web application. On the left, there are two sections: '+ Recently Updated' and '+ Recently Created', each with a 'View all' button. The main form area is titled 'Add Transaction' and contains a 'Transaction Information' section. The 'Location' field is a dropdown menu with a red asterisk indicating it is a required field. The dropdown is open, showing options: '- Select Location -', 'Broadway Office', 'Martha's Team', and 'Paperless Real Estate'. To the right of the dropdown, there is a red asterisk and the text '* Required field *'. Below this, a light blue box contains the text: 'Enter the location associated with this transaction. Important: For security reasons, only your company admin can change the location after this transaction has been created.'

Transaction Name or Property Address

Enter the *Transaction Name* according to your office's preferred naming convention.

The screenshot shows the 'Add Transaction' form in a web application. On the left, there are two sections: '+ Recently Updated' and '+ Recently Created', each with a 'View all' button. The main form area is titled 'Add Transaction' and contains a 'Transaction Information' section. The 'Location' field is a dropdown menu with a red asterisk indicating it is a required field. The dropdown is open, showing options: '- Select Location -', 'Broadway Office', 'Martha's Team', and 'Paperless Real Estate'. Below the 'Location' field, there is a 'Transaction Name or Property Address' field with a red asterisk indicating it is a required field. The field is highlighted in yellow. Below the field, there is a dark blue box with the text: 'USE FORMAT -- 149 Union Avenue, Memphis, TN, 38103'.

MLS or Transaction Number

Enter the *MLS or Transaction Number*.

MLS or Transaction Number

Status *

Enter the MLS or transaction number.

For example: 123456

Status

Select the *Status* that best describes the current stage of the transaction.

Status *

- Select Status -

Active

Active

Listing

Listed

Pending

Ready to Close

Under Contract

Other

Referral

* Required field *

Select the stage that best describes the current status of the transaction.

Label

Select the *Label* that best applies to the transaction.

Label

- Select Label -

Commercial

Condo

Land and Lot

New Build

Residential

Select the label that best applies to the transaction.

Listing, Expiration, Acceptance & Close Date

Select or enter the *Listing Date*, *Expiration Date*, *Acceptance Date* and *Close Date* for the transaction in the format mm/dd/yy.

Listing Date 07/28/2023	Automatic Expiration Date
Acceptance Date	Close Date

Enter the acceptance date in the format m/d/yyyy.

August 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Contingency Dates

Select or enter the *Contingency Dates* for the transaction in the format mm/dd/yy.

Contingency Dates

Earnest Money Due Date	Earnest Money Deposit Date
Inspection Due Date	Inspection Date
Loan Approval Due Date	Loan Approval Date
Appraisal Due Date	Appraisal Date
Option Period End Date	

Enter the earnest money due date for this transaction in the format m/d/yyyy.

Additional Information

Complete any *Other Information* or *More Info* requested by your office.

Other Information

In-house TC

Select an Option

Photography Shoot

City

Select an Option

Entry Instructions

More Info

Property URL -

FSBO -

Lock box - #

Year Built -

HOA -

Home Warranty -

Legal Description - _____

Admin Info

For admins only, enter any *Admin Info* that should only be seen by admins and not be visible to agents.

Admin Info (only visible to admin staff)

Flagged for Admi's Review - Enter Y or N

Transaction Coordinator Requested - Enter Y or N

Agent's Plan - Enter BASIC or PREMIUM

Special Notes - _____

Seller Name & Lead Source

Enter the *Seller Name* & *Seller Lead Source* (if applicable).

Buyer, Seller, Pricing, etc.

Hide

Seller Name

Seller Lead Source

- Select Lead Source -

add seller as contact

Enter the name of the home seller.

Add Seller Contact

Optionally, add the *Seller* as a *Contact* on the transaction by clicking [add seller as contact] and then entering their *Address, Email, Phone, and Fax / Other*.

Enter the estimated *Total Commission*.

Total Commission

\$

Enter the estimated commission here to help track revenue.

Commission Summary

Elaborate on the commission in the *Commission Summary*, if necessary.

Commission summary

Earnest Money Amount - \$

Commission Percent - \$

Broker Commission - \$

Referral Fee - \$

Elaborate on the commission here, if necessary.

Assign Agents

In the *Assign Agents* section, add any in-house agents and assistants to the transaction.

Add an Agent

For each agent, search for their name or find it in the list, then check the appropriate *Listing* or *Buying* box next to it.

Assigned Agents will appear on the right.

Assign Agents

Search by agent name or select by location

Search by name

— Broadway Office

Listing

Buying

Agent

☐

☒

Jacqueline Apple

☐

☐

Hollis Holcomb

☐

☐

Albert Jacks

— Martha's Team

Listing

Buying

Agent

☐

☐

Martha Jewel

☐

☐

Lucy Rose

— Paperless Real Estate

Listing

Buying

Agent

☐

☐

Robert Zimmerman

Assigned Agents

Listing

Buying

Agent

☐

☒

Jacqueline Apple

Designate an Assistant

You can also add assistants by adding them as agents, then clicking [make assistant] next to their name.

Assistants will appear in the *Assigned Assistants* section on the right.

Assign Agents Search by agent name or select by location
Search by name

— Broadway Office

Listing	Buying	Agent
☐	☐	Jacqueline Apple
☐	☐	Hollis Holcomb
☐	☐	Albert Jacks

— Martha Jewel Team

Listing	Buying	Agent
☒	☐	Martha Jewel
☒	☐	Lucy Rose

Assigned Agents

Listing	Buying	Agent
☒	☐	Martha Jewel
☒	☐	Lucy Rose make assistant

Outside (Co-op) Agents

If agents outside your company are involved in the transaction, check the box next to [This transaction has outside (co-op) agents], then enter the *Outside Listing Agent* or *Outside Buying Agent's Name / Info, Email, and Phone*.

Outside (Co-op) Agents can be added for reference only and will not have access to the transaction.

☒ This transaction has outside (co-op) agents

Outside Listing Agent

Name / Info:

Email:

Phone:

Outside Buying Agent

Name / Info:

Email:

Phone:

When you have more information later, you can come back to the transaction and edit it [Learn how](#) →

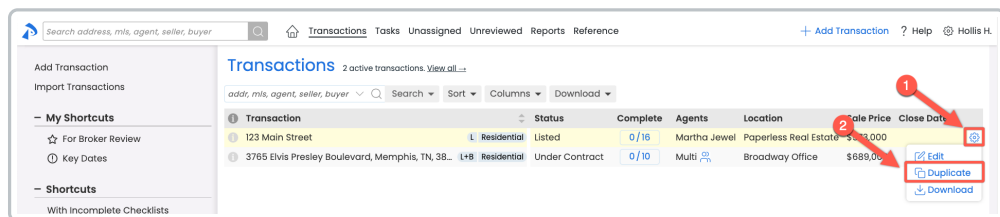
Duplicate A Transaction

Duplicate a transaction to save time by creating a new transaction based on an existing one. For example, duplicate a transaction to start over when a buyer's offer falls through, duplicate a template transaction to use default info for certain transactions, and duplicate a single transaction multiple times to handle a parcel of properties.

Who Can Do This? Admins can duplicate transactions.

To duplicate a transaction:

- 1 Go to the **Transactions List** page by clicking [Transactions] from the top menu.
- 2 Click the transaction's gear, then [Duplicate].



Need to re-list or add an additional offer to an existing transaction? Use [New Offer](#) instead. [Learn more about New Offer](#) →

- 3 If needed, update the **Transaction Name** for the copied transaction.

Duplicate 123 Main Street

Need to re-list or add an additional offer to an existing transaction?
Use [New Offer](#) instead of Duplicate.

Duplicate Transaction Options

Transaction Name *

Copy of 123 Main Street

☒ Copy over all docs (with new upload dates, no activity)

☒ Copy over all checklists (with no activity)

Cancel

Duplicate Transaction

Duplicate **123 Main Street** into a new transaction.

The following data will be copied over to the new transaction:

- All transaction fields except MLS Number
- All agents
- All contacts

4 Check the additional items you want to copy over:

- Click [Copy over all docs] to copy over all docs. Copied docs will have new upload dates with no review / comment activity.
- Click [Copy over all checklists] to copy over all checklists with no activity. If unchecked, any checklists set to be auto-applied will still be added.

Duplicate 123 Main Street

Need to re-list or add an additional offer to an existing transaction?
Use [New Offer](#) instead of Duplicate.

Duplicate Transaction Options

Transaction Name *

Copy of 123 Main Street

☒ Copy over all docs (with new upload dates, no activity)

☒ Copy over all checklists (with no activity)

5 Click [Duplicate Transaction] to create a copy of the transaction.

Duplicate 123 Main Street

Need to re-list or add an additional offer to an existing transaction?
Use [New Offer](#) instead of Duplicate.

Duplicate Transaction Options

Transaction Name *

Copy of 123 Main Street

☒ Copy over all docs (with new upload dates, no activity)

☒ Copy over all checklists (with no activity)

Cancel

Duplicate Transaction

6 Add or update any new information for the copied transaction, then save it.

The transaction below was successfully duplicated from 123 Main Street.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H

Edit Transaction

Upload Docs

Assign Docs

Transaction History

Received Emails (0)

Download Transaction

Go back to Copy of 123 Main Street

Checklists 0% ✓

Residential Listing

- ☐ Purchase Agreement 9/29
- ☐ Seller's property disclosure 7/2
- ☐ Agency Disclosure
- ☐ Lead based paint addendum (if applicable) 8/3
- ☐ MLS input sheet
- ☐ Seller's authorization to advertise property

Transaction Information Save Transaction

Location *
Paperless Real Estate

Transaction Name or Property Address *
Copy of 123 Main Street

MLS or Transaction Number

Status *
Listed

Label
Residential

Listing Date
07/20/2023

Automatic Expiration Date
08/20/2024

Acceptance Date
09/29/2023

Close Date

Edit a Transaction

Edit a transaction in your company's account to make any necessary updates to the information.

Who Can Do This? A transaction can be edited by agents added to the transaction and admins.

To make changes to a transaction:

- 1 **Go to the Transaction**
 - Open the transaction where you need to take action.
- 2 **Click [Edit Transaction]** from the left menu.
- 3 **Add or update any new information you have for the transaction (described above), then save it.**

 **The ability to edit certain fields on a transaction varies** If you need to update a certain field and are unable to do so, ask your admin to make the change for you. [Learn more →](#)

Delete a Transaction

Permanently remove a transaction from your Paperless Pipeline account.

Who Can Do This? Master admins can permanently remove transactions.

To delete a transaction permanently:

- 1 **Go to the Transaction**
 - Open the transaction where you need to take action.
- 2 **Scroll to the bottom, then select [Delete this transaction]** in the lower right corner.
- 3 **Confirm permanent deletion of the transaction** by clicking [Delete Permanently].