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*).

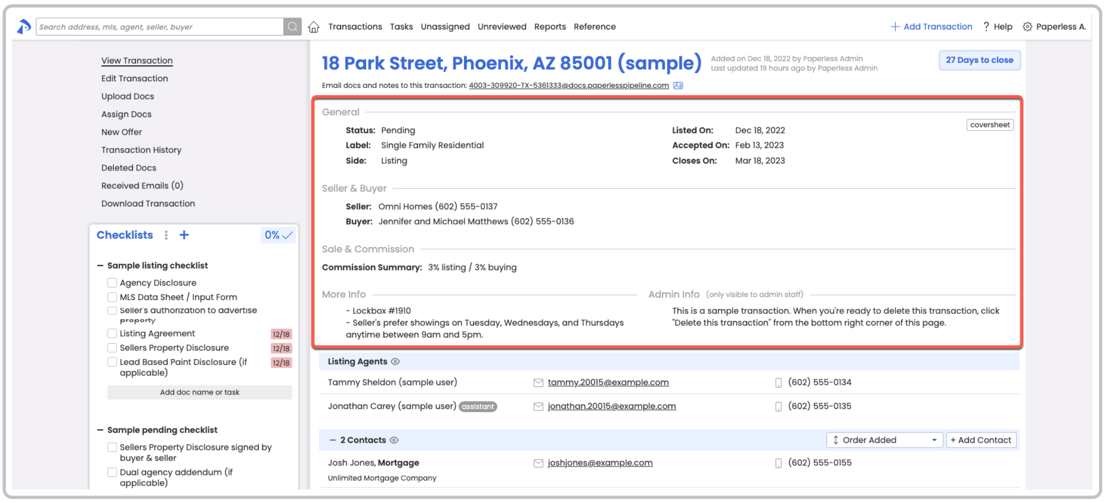
To view a transaction:

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.

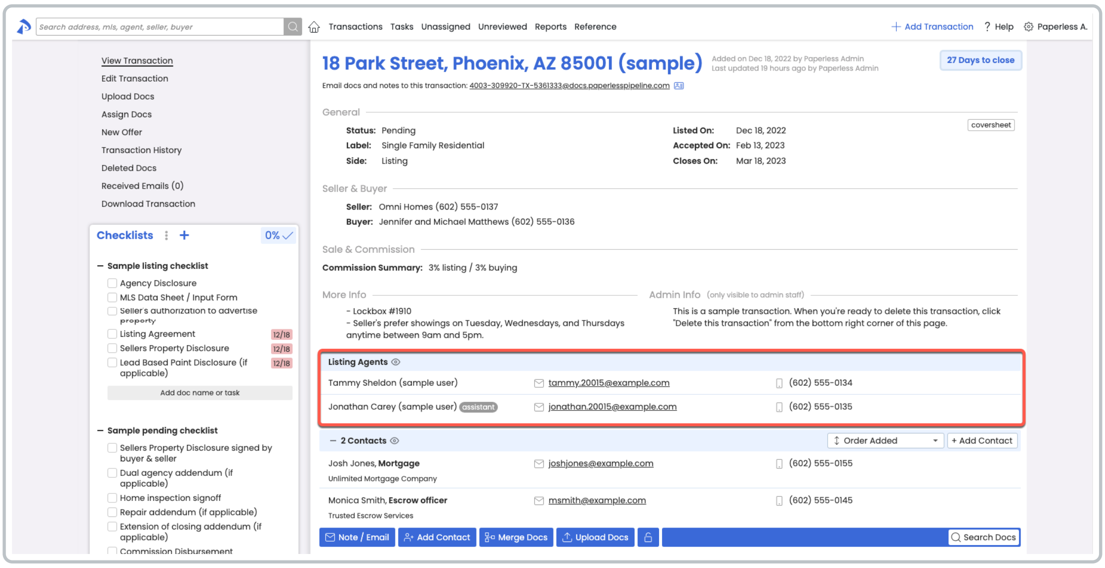
This *Information* can be entered when the transaction isadded or edited.



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.

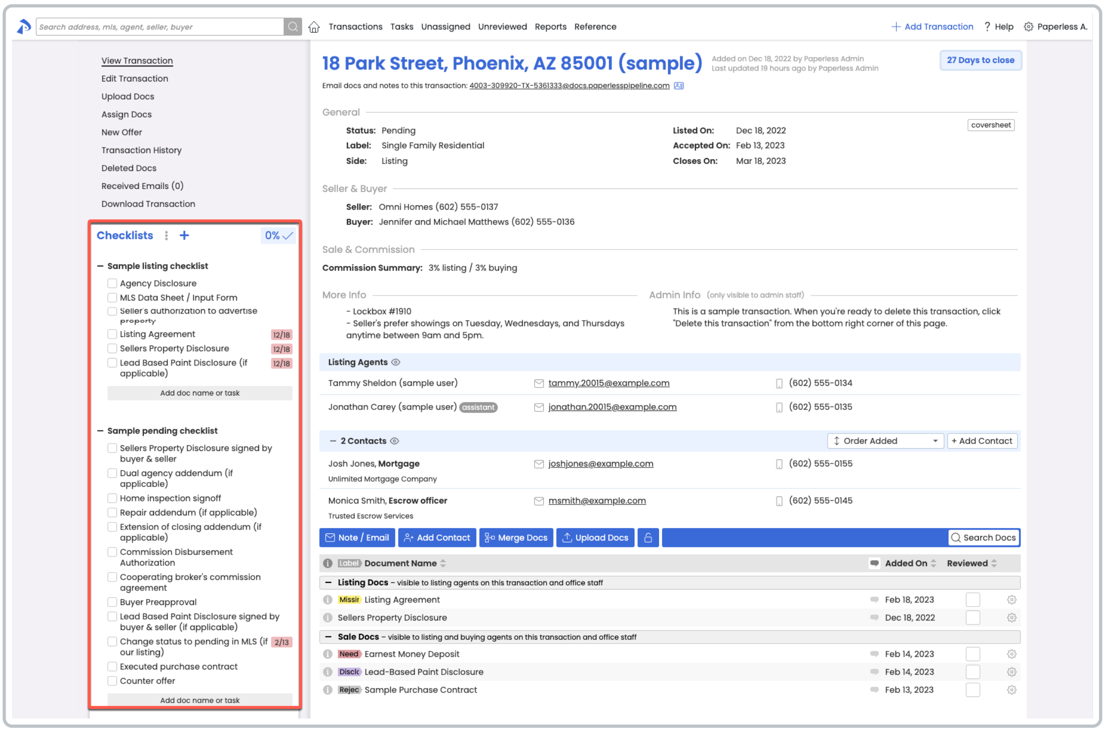
They also display *Outside (Co-Op) Agents* who do not have access to the system.



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.

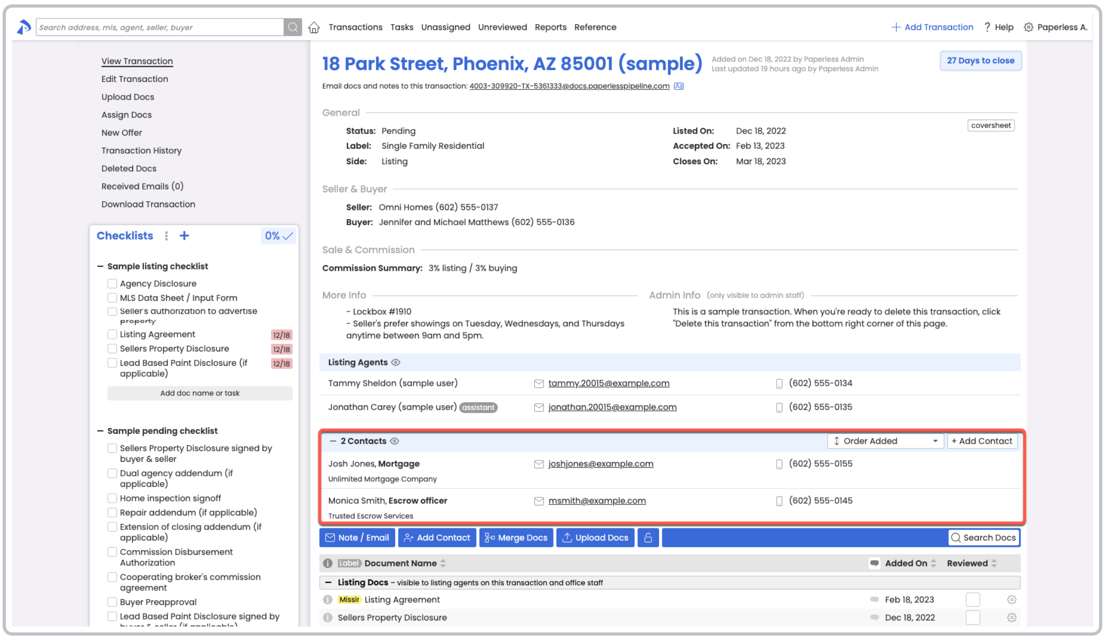
Checklists can be added to transactions automatically or manually by agents and admins (with the appropriate permissions). Learn more about Checklists & Tasks →



Contacts

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

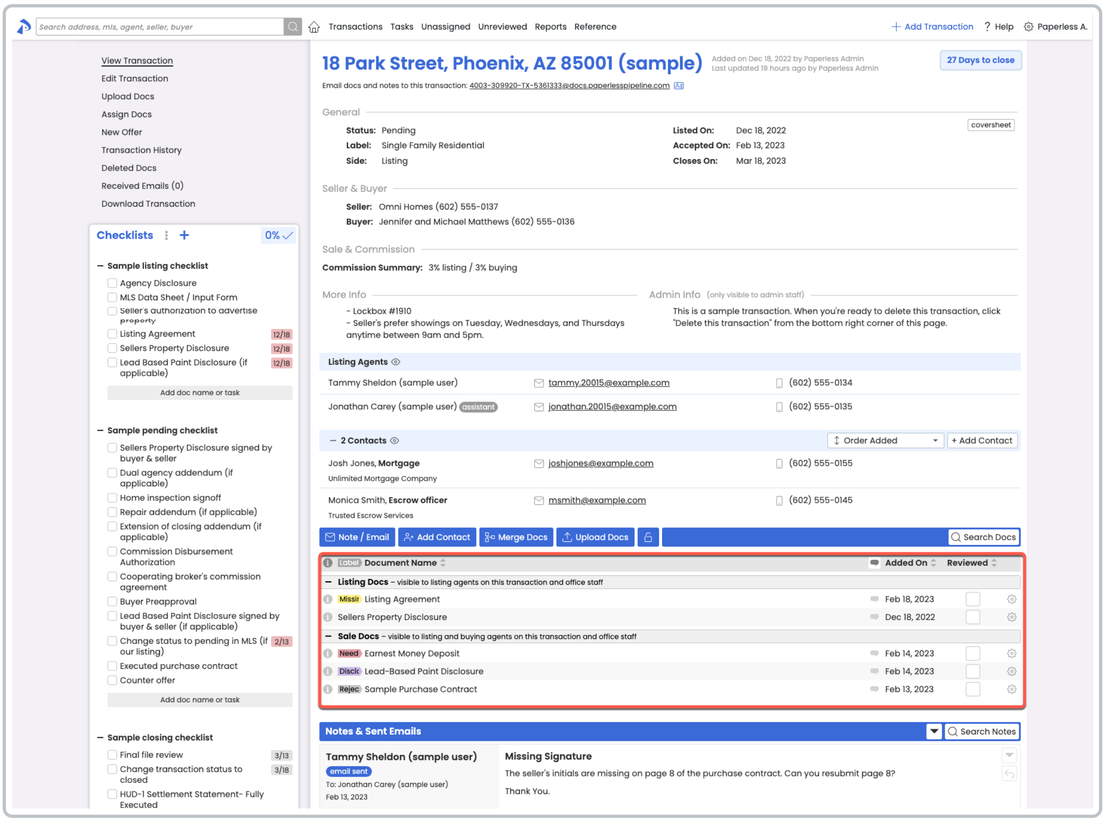
Contacts can be added to the transaction by agents or admins.Learn more about Contacts →



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*.

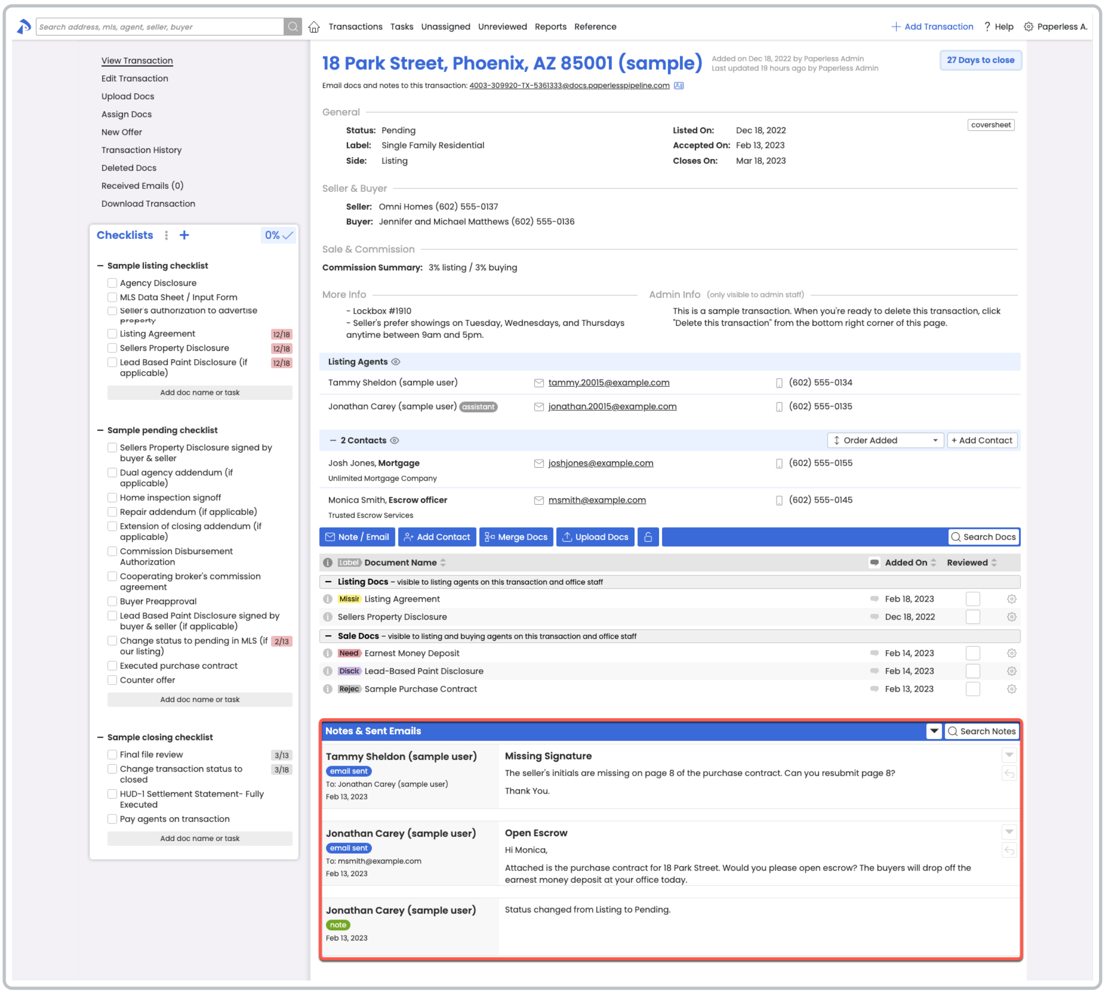
Docs can be added to transactions by agents and admins (with the appropriate permissions). Learn more about Uploading Docs →



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 →



Received Emails

Received Emails can be viewed by clicking *Received Emails* on the left menu.

Agents and admins (with the appropriate permissions) can send emails to the transaction. Agents can only view emails they send to transactions, and admins can view all received emails. Learn more about Received Emails →

Transaction History

Transaction History can be viewed by clicking *Transaction History* on the left menu.

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.

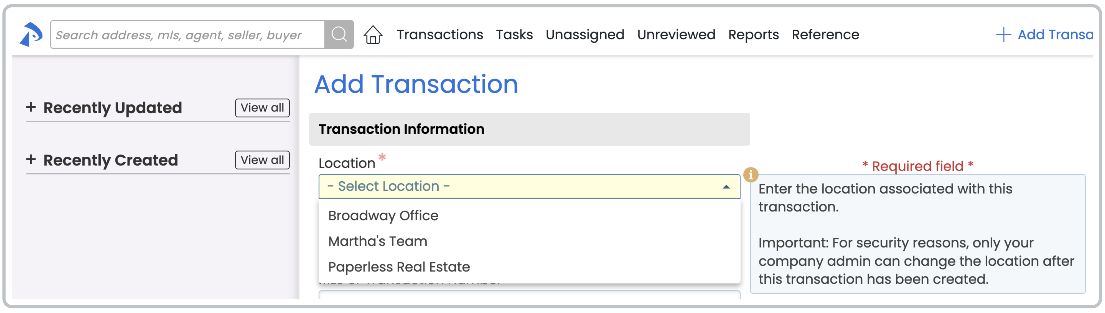
Who Can Do This? A transaction can be added by admins and agents with permission to *Create transactions.*

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.**

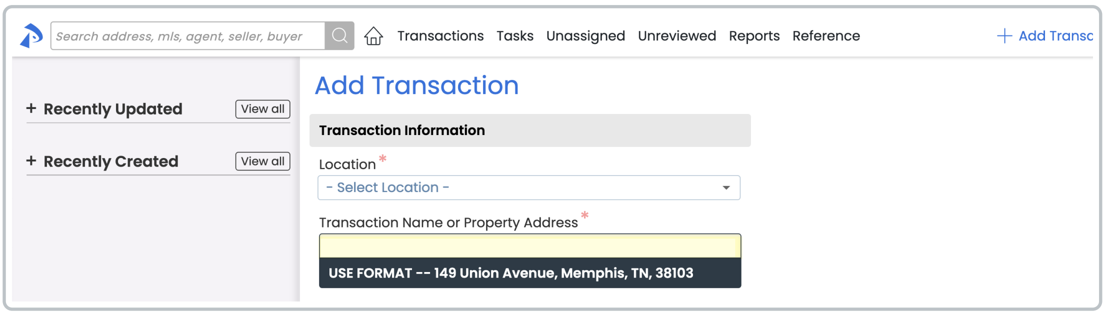
Location

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



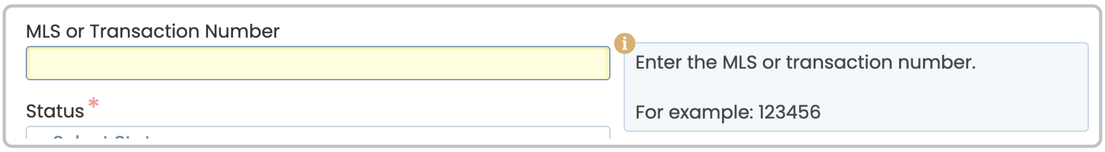
Transaction Name or Property Address

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



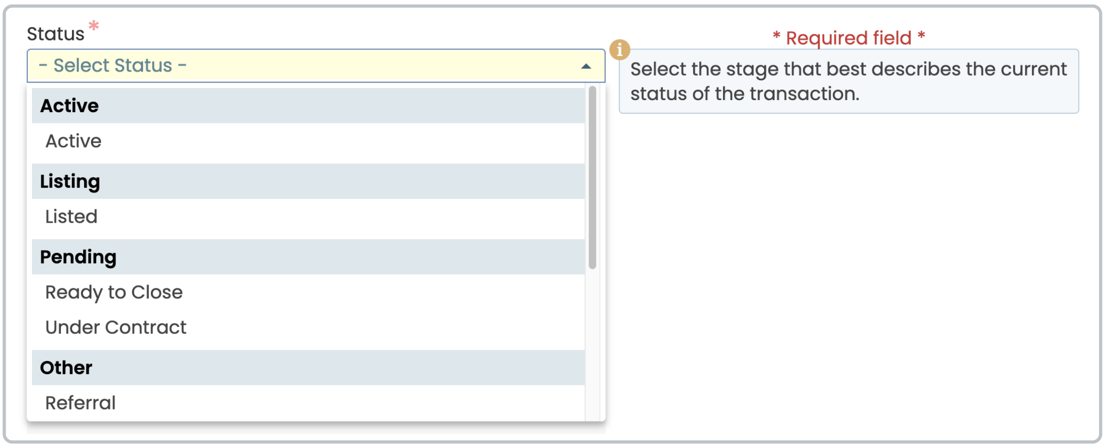
MLS or Transaction Number

Enter the *MLS or Transaction Number.*



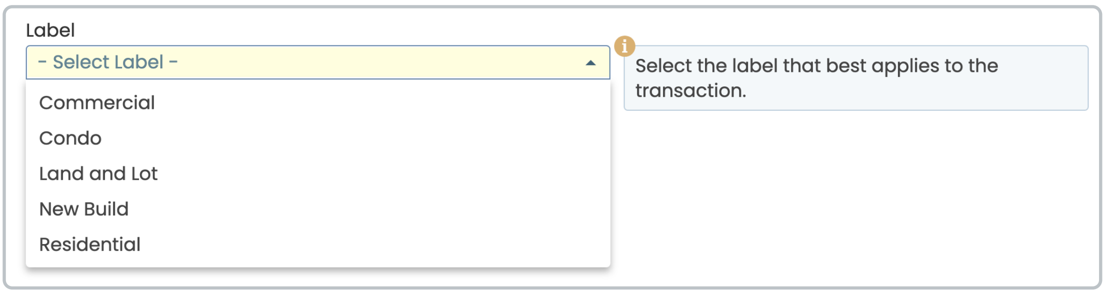
Status

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



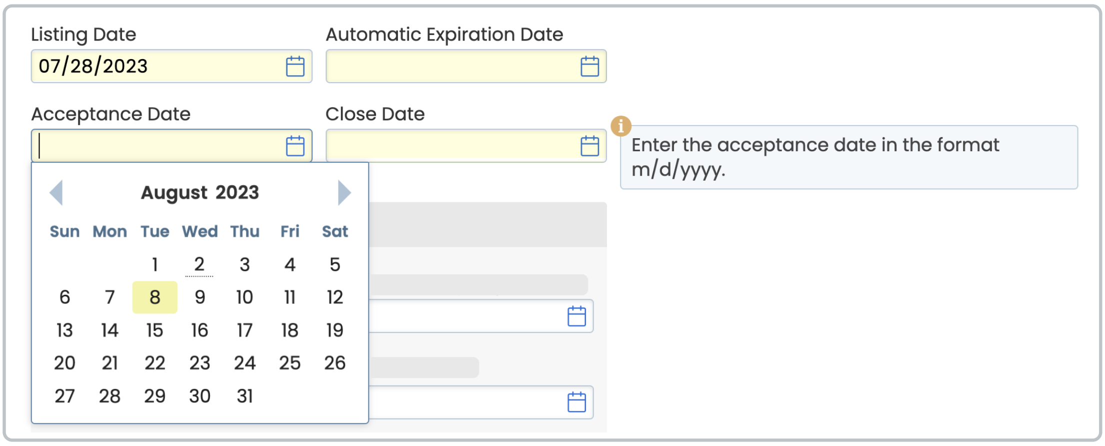
Label

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



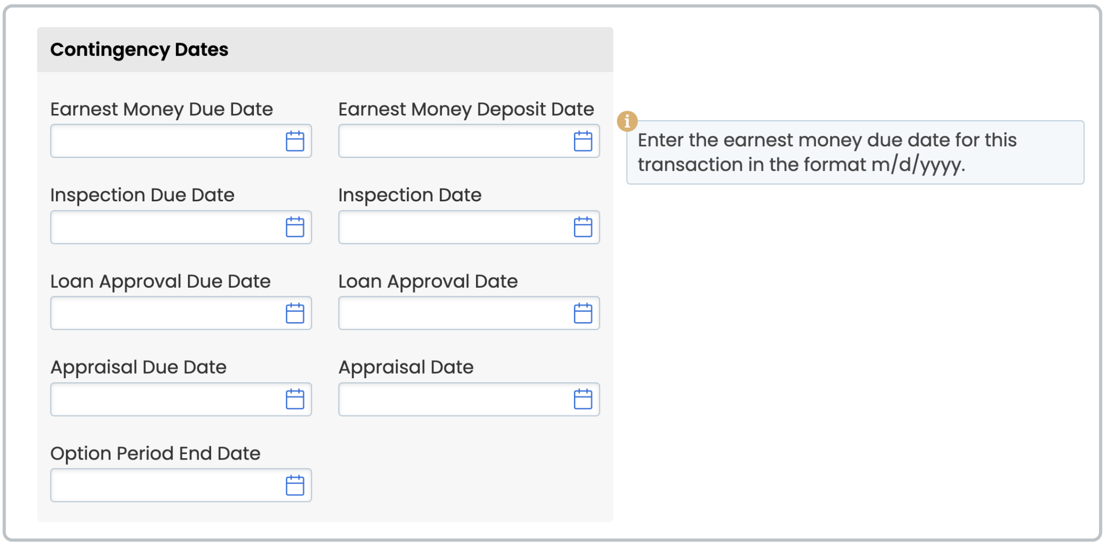
Listing, Expiration, Acceptance & Close Date

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



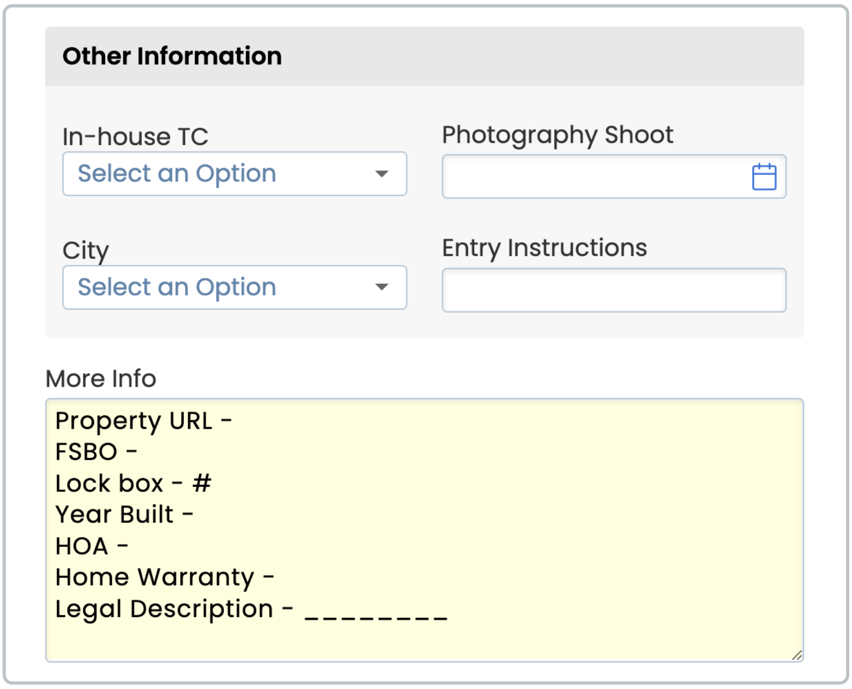
Contingency Dates

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



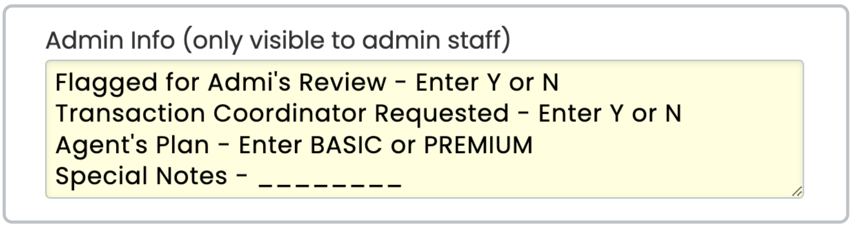
Additional Information

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



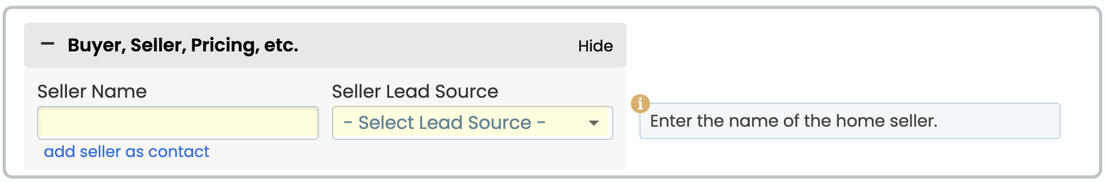
Admin Info

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



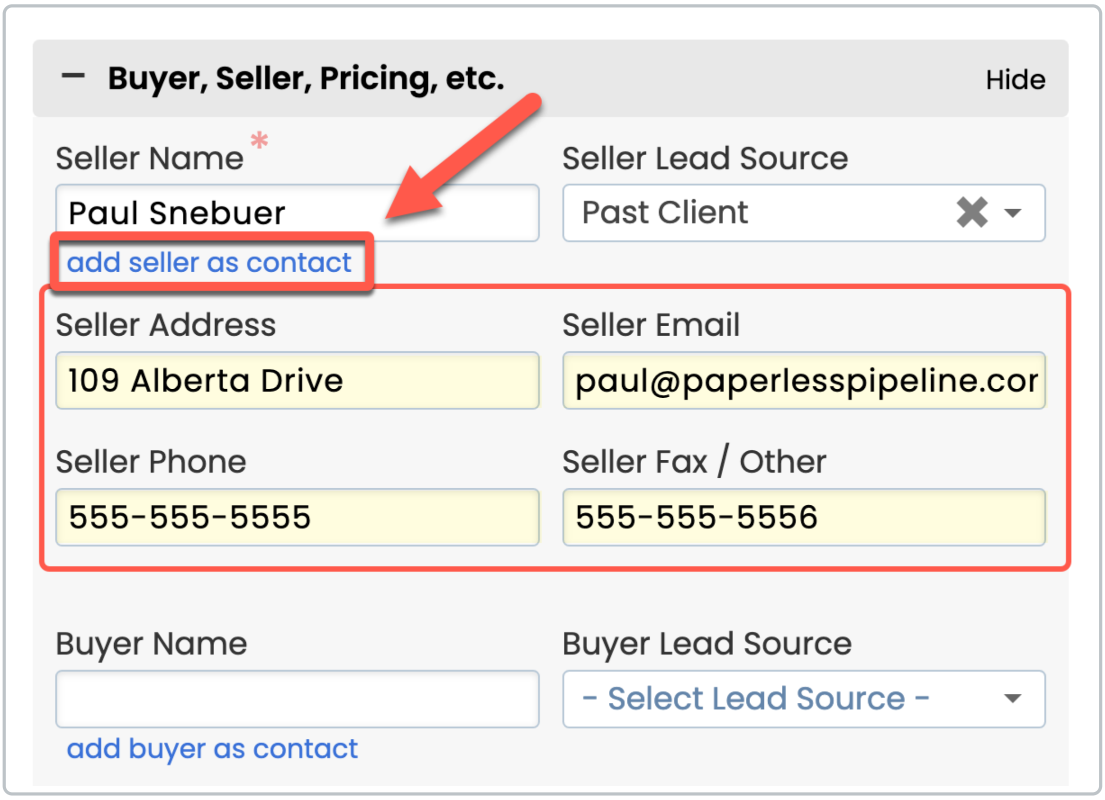
Seller Name & Lead Source

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



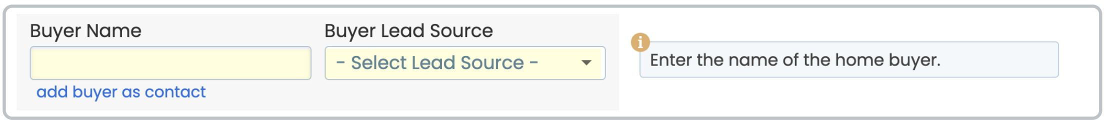
Add Seller Contact

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*.



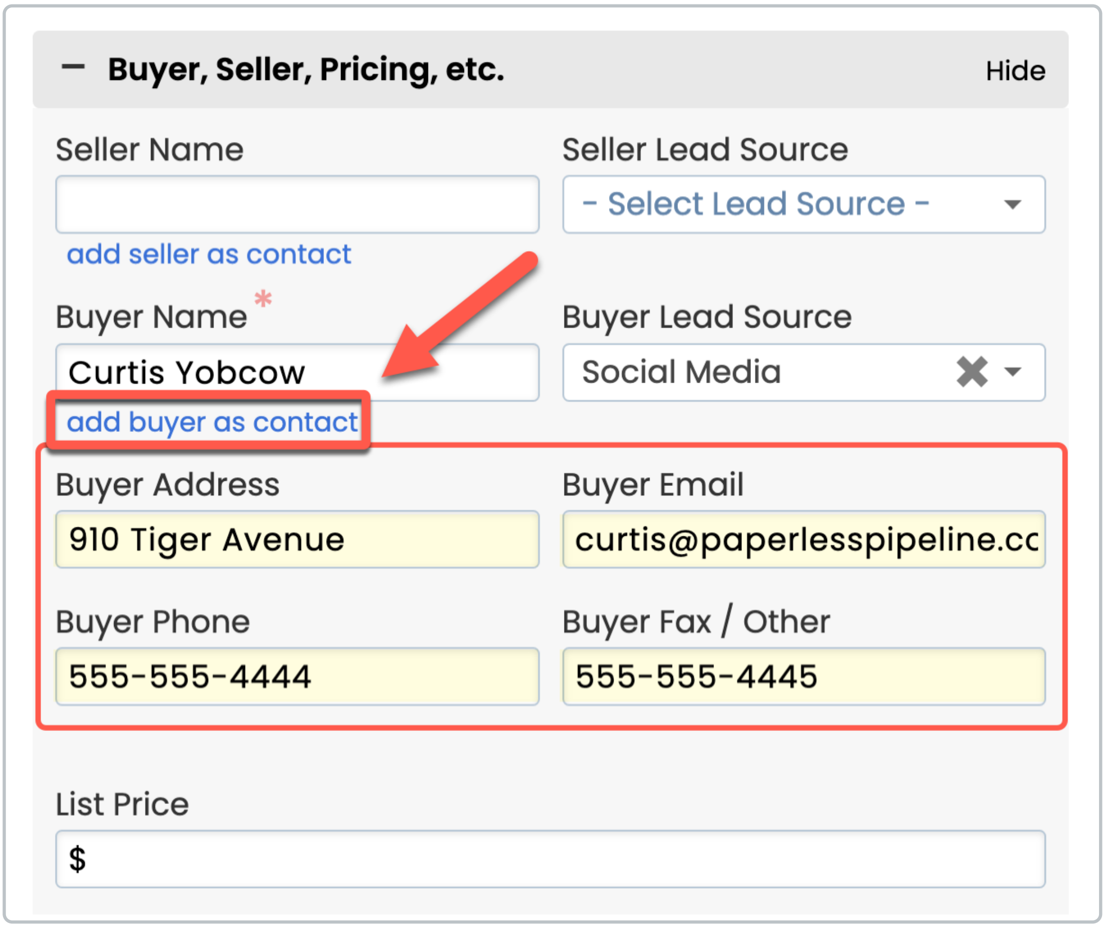
Buyer Name & Lead Source

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



Add Buyer Contact

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



List Price

Enter the current *List Price.*

Sale Price

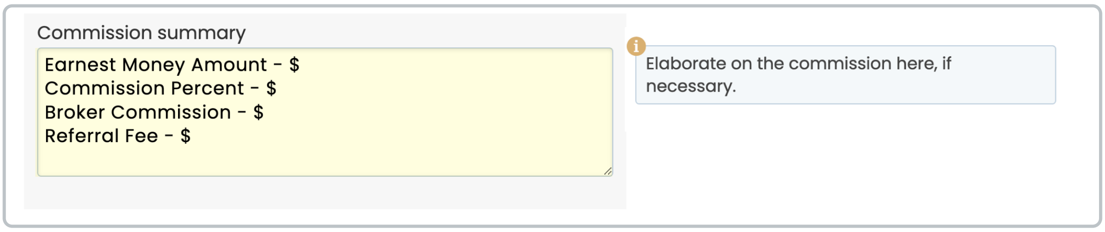
Enter the *Sale Price* if the property is already under contract.

Total Commission

Enter the estimated *Total Commission.*

Commission Summary

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



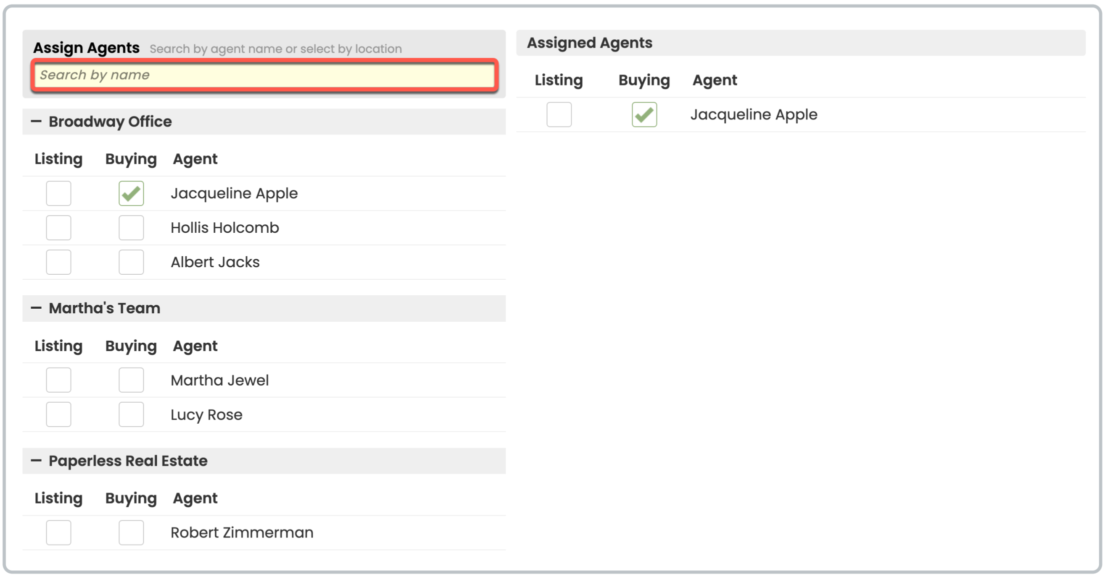
Assign Agents

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.

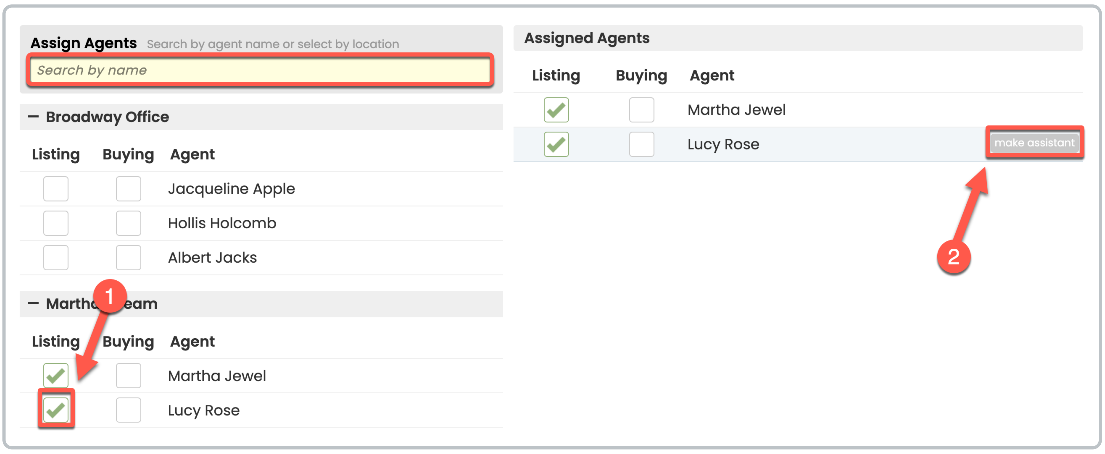
Assigned Agents will appear on the right.



Designate an Assistant

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

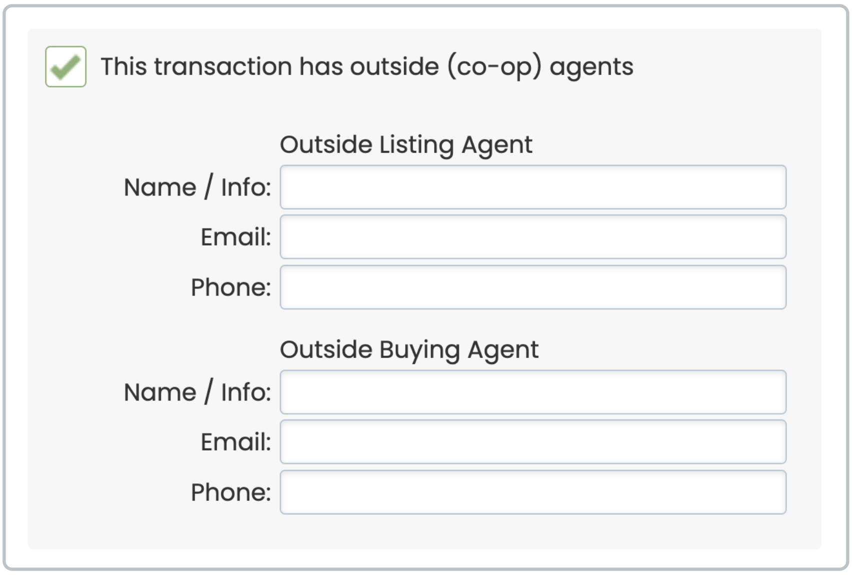
Assistants will appear in the *Assigned Assistants* section on the right.



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.



When you have more information later, you can come back to the transaction and edit it. Learn how →

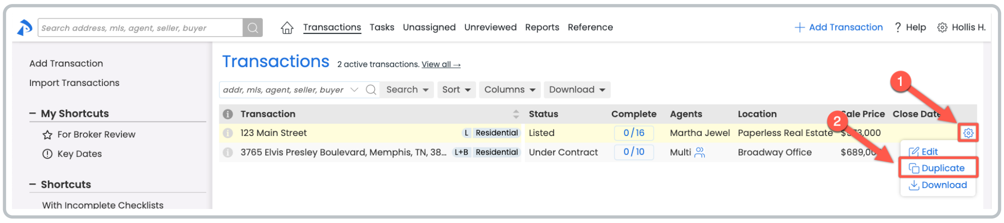
Duplicate A Transaction

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.

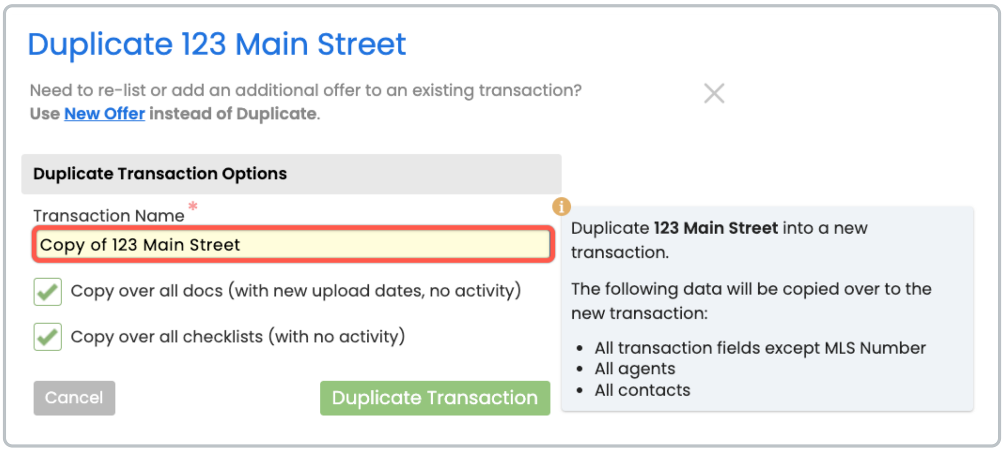
To duplicate a transaction:

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 →

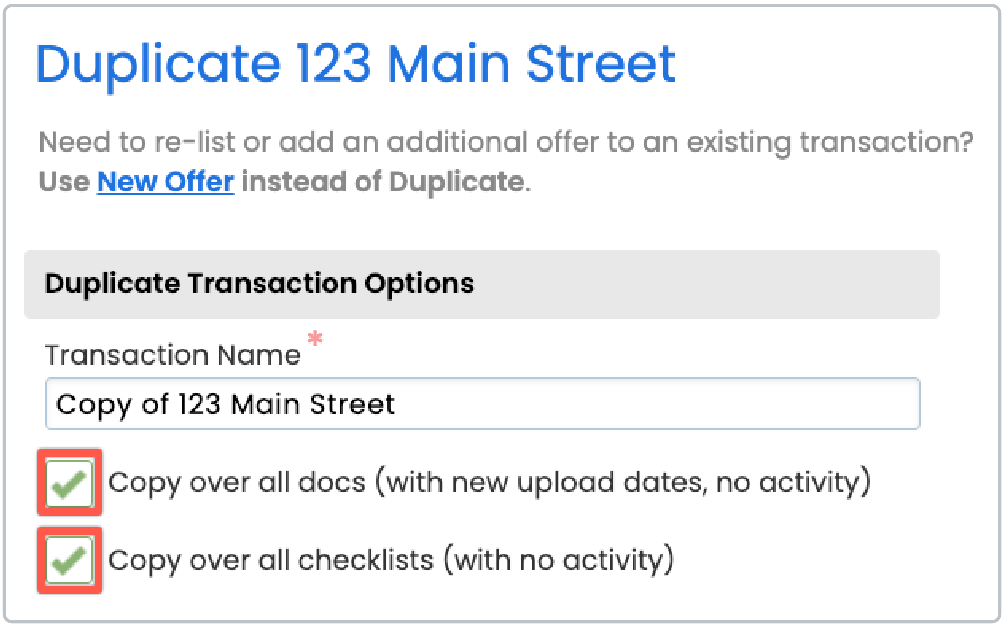
3. **If needed, update the *Transaction Name* for the copied transaction.**



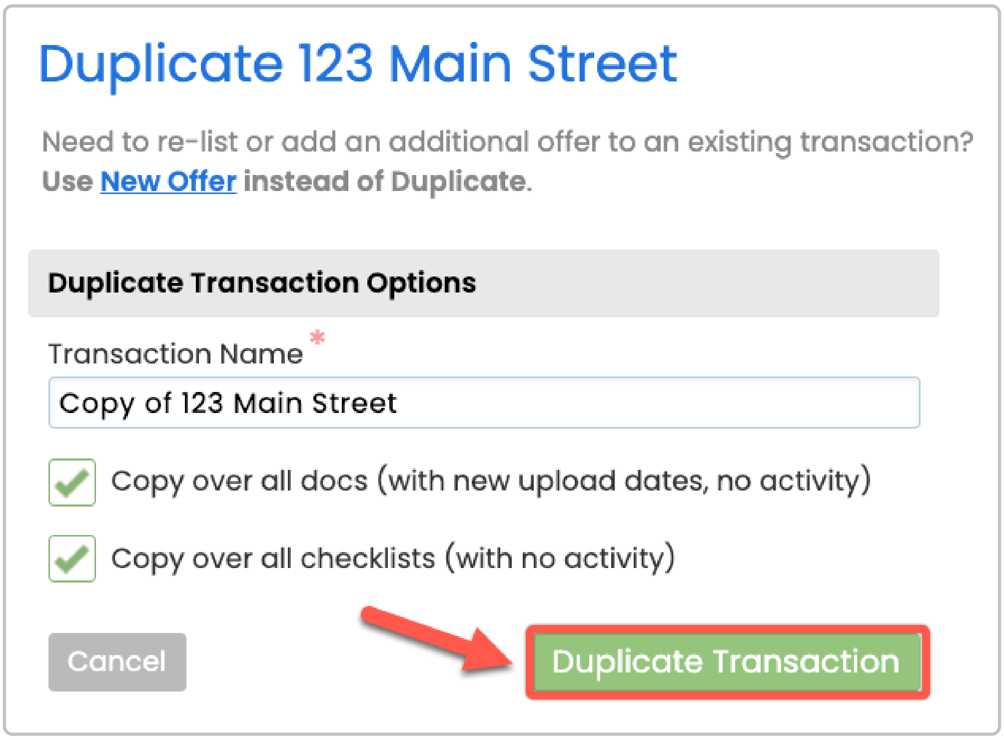
4 **Check the additional items you want to copy over:**

- **Click [Copy over all docs]** to copy over all docs. Copied docs will have new upload dates with no review / comment activity.

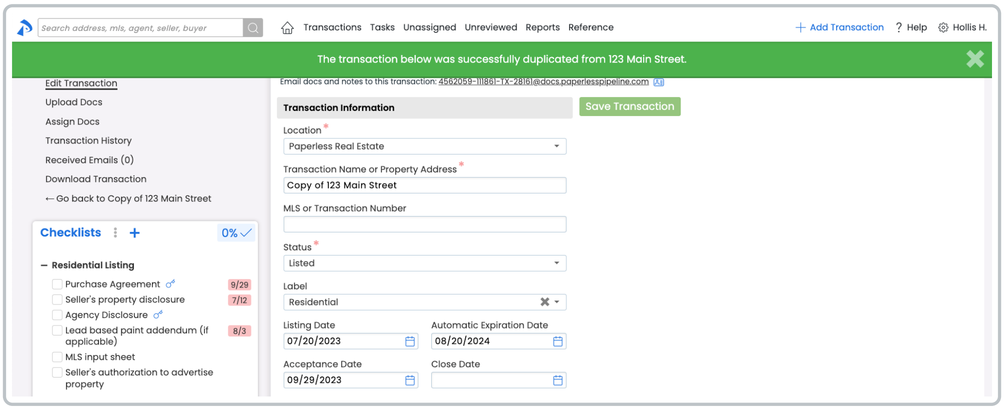
- **Click [Copy over all checklists]** to copy over all checklists with no activity. If unchecked, any checklists set to be auto-applied will still be added.



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



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



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].