

Creating New Offers

Create a New Offer when a deal falls through or you're handling multiple offers at once. New Offer creates a separate, linked transaction with only your side's details, keeping everything clear, organized, and fully documented.

How It Works

Smart Duplication

When you create a New Offer, you're not starting over, you're starting smart.

Pipeline uses the original transaction as a base, copying what still applies and skipping what doesn't. You get a clean, focused version of the deal tailored to your side.

What Carries Over

New Offer pulls in only the details relevant to your side:

If you're on the listing side:

- Listing Agents
- Seller-specific Info and Docs (no Buyer or Sale docs)

If you're on the buying side:

- Buying Agents
- Buyer-specific Info and Docs (no Listing or Sale docs)

Optional for both sides:

- Checklist Tasks (except those only visible to agents on the other side)
- Notes & Emails

You keep what's useful and avoid clutter from the opposite party.

Linked Transactions

Each New Offer is a standalone transaction with its own timeline, tasks, and documents.

It links back to the original, and the original links to all related New Offer transactions, making it

easy to trace the full history and switch between them easily.

Quota-Friendly

The first five New Offers created from a single transaction do not count toward your company's monthly quota.

You can confidently manage fall-throughs, backups, or multiple offers without worrying about usage limits.

Best Practices

Keep New Offers clean, clear, and easy to track with these tips:

- **Name Clearly:** Add the offer number or client name to the title.
Example: 123 Main (#2) OR J. Smith (#2)
- **Use the Original for Offer #1:** Only create a New Offer for the second offer or beyond.
- **One Offer, One Transaction:** Create a separate New Offer for every re-list, new offer, or backup.
- **Copy with Intention:** Only bring over what's still useful. Leave out tasks or notes that no longer apply.
- **Keep Statuses Accurate:** Use statuses like Active, Fell Through, or Closed to keep progress visible at a glance.
- **Use Links to Navigate:** New Offers link back to the original, and vice versa. Use these built-in links to stay organized and switch between related transactions fast.

Create a New Offer

Create a New Offer to start fresh on a new deal without losing the history of the previous one.

Who Can Do This: Anyone with *Create Transactions* permission.

To create a New Offer:

1 Go to the Transaction

- Open the transaction where you need to take action.

2 Start the New Offer

- Click [New Offer] from the left menu.

3 Update the Details

- Give it a unique name.
- Select the appropriate *Status* for the new offer.

New Offer for Gideon Nash
Copy buyer-related data to a new transaction to manage a new offer

New Offer Information

Transaction name * required
9711 Maple Rd (#2)

Status *
Fell Through

☒ Copy over all checklist tasks (except those assigned to listing agents)
☐ Copy over all notes to the new transaction

Cancel Create Offer

The following buyer-related data will be copied from **9711 Maple Rd** to a new transaction that can be managed independently:

- All buyer-related transaction field data
- Buying agents
- All docs except sale & listing docs
- All contacts except listing contacts

4 (Optional) Copy Tasks and Notes

- To copy over all tasks (except those only visible to agents on the other side), check *Copy over all checklist tasks*.
- To copy over all notes, check *Copy over all notes*.

New Offer for Gideon Nash
Copy buyer-related data to a new transaction to manage a new offer

New Offer Information

Transaction name * required
9711 Maple Rd (#2)

Status *
Fell Through

☒ Copy over all checklist tasks (except those assigned to listing agents)
☐ Copy over all notes to the new transaction

Cancel Create Offer

The following buyer-related data will be copied from **9711 Maple Rd** to a new transaction that can be managed independently:

- All buyer-related transaction field data
- Buying agents
- All docs except sale & listing docs
- All contacts except listing contacts

5 Save the New Offer

- Click [Create Offer]. The new transaction is now live and linked to the original.

Access Related Transactions

Quickly see which transactions are connected, whether you're viewing the original or a new offer.

Who Can Do This: Anyone.

To view the original linked to a new offer, or view new offers linked to an original:

1 Go to the Transaction

- Open the transaction where you need to take action.

2 Access Related Transactions

- See related transaction links in the *Seller & Buyer* section.
- If you're viewing a new offer, you'll see a link back to the original.
- If you're viewing an original transaction, you'll see links to each related new offer.

The screenshot shows a transaction page for '9711 Maple Rd'. The page is divided into sections: General, Seller & Buyer, and Sale & Commission. In the Seller & Buyer section, there is a 'New Offers' box with two links: '9711 Maple Rd (#2)' and '9711 Maple Rd (#3)'. The page also includes a 'coversheet' button and contact information for Lewis Latimer.

General	
Status:	Pending
MLS #:	MLS725532
Label:	Rental
Side:	Buying
Location:	The Roomers
Listed On:	May 22, 2025
Accepted On:	May 23, 2025
Closed On:	Jun 30, 2025

Seller & Buyer	
Seller:	Finnian Bright
Buyer:	Gideon Nash
New Offers: 9711 Maple Rd (#2) 9711 Maple Rd (#3)	

Sale & Commission	
List Price:	\$681,439
Sale Price:	\$674,423

Buying Agents
Lewis Latimer
hollis+lewislatimer@paperlesspipeline.com
(555) 277-2170

Pipeline Pro: New Offer ?

This Pipeline Pro session covers the *New Offer* feature: How it works, when to use it, and all its wonderful perks. (December 12, 2018)

🕒 10:26

Ways to Use New Offer

Use New Offer whenever you need to restart a deal without overwriting the past.

Track a New Offer After a Deal Falls Through

No matter which side you represent, create a New Offer to start fresh without erasing the original transaction's history after a deal has fallen through.

Manage Multiple Offers on the Same Listing

Several buyers are interested at once. Create a New Offer for each one to keep timelines, documents, and communication clean and separate. This is especially helpful during negotiations.

Re-List a Property After a Terminated Contract

After a failed closing, the seller re-lists the property. Spin off a New Offer that carries forward the listing-side data but drops the prior buyer's details.

Create a Backup Offer Transaction

A secondary buyer wants to stay in play in case the primary deal falls apart. Use a New Offer to log the backup without affecting the active transaction.