Your Transactions

The deals you are on are the deals you can open. Here is how to find them, work them, and understand why one is or is not yours.

Introduction

Access comes from being assigned to a transaction. Not from having created it, and not from having emailed something to it. Someone at your office puts you on the file and it appears on your list.

That one fact answers most of the questions agents have about what they can and cannot see. Some offices also let agents open their own files, and this page covers that too.

1. Find the Deals You Are On

Your list holds the transactions you have access to and nothing else, so it is shorter than your admin's. Pick your columns once and it opens that way from then on.

The Transactions page lists every transaction you have access to — shaped by the columns you pick, the order you sort, and the scope you set.

See Transactions List

2. Open a File When a Deal Starts

If your office has turned this on for you, the button sits in the upper-right corner of every page, and a status and a label are all it needs to save. Check your name on the Listing or Buying side and the file is yours from that moment.

Add a new transaction to start tracking a listing or sale in your company's Pipeline account.

See Adding a Transaction

3. Record the Other Side's Agent

The agent at the other brokerage goes on the same form, with their name, email, and phone, so the whole office can reach them. They are kept for reference only.

Record the agent from the other brokerage for reference, without giving them any access to your transaction.

See Outside (Co-op) Agents

4. Open One and Keep It Current

The details are the deal: its dates, its price, the people on it. Open the transaction and Edit Transaction is where any of them changes. Anything your office has locked will show but not take an edit, and your admin can change it for you.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

The four dates on the file matter most. Your office's reports, reminders and task deadlines count from them, so change one the day it moves.

Enter a deal's listing, expiration, acceptance and close dates, and Pipeline counts deadlines and builds reports from them.

See Transaction Dates

5. Put the People on the File

The escrow officer, the lender, and your own buyer or seller belong on the transaction, where the next person to open it can find them. A contact is a reference entry and gives nobody a login.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

6. Keep the Conversation on the Deal

One composer above the documents sends an email to your office or an outside address, or leaves a note that goes to no one. Either way it stays on the transaction with the docs it was about.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

7. Understand Why a File Is Yours

If a deal you expect is missing, you are not on it yet. Ask your office to assign you rather than searching for it, since a file you are not on does not appear at all.

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See Transaction Access

See Where Your Transactions Go From Here

Your part of a deal is the file, the documents, and the tasks. To see what happens to a transaction after you hand it in, from the office's review to the signatures and the commission, walk one deal end to end.

One listing agreement arrives and one file carries the deal to the closing table: the transaction is built from the contract, the checklist applies itself, documents and email land on the record, signatures come back on their own, and the commission becomes a CDA.

See How a Transaction Moves Through Pipeline