Running Transactions Day to Day

One deal from the day it opens to the month it closes. Put a real property through this once and the rest of the system explains itself.

Introduction

Putting the agents on a transaction is what opens the file to them, credits the deal to them, and lets them upload to it. A deal with nobody on it is a deal only admins can work.

From there the deal runs on a loop: a document comes in, the agent checks the task, you review it, and the file gets updated as the deal moves. This page follows that loop in order.

1. Open a New Deal

Name it the way your office names things, since the name is how everyone recognises it in a list. The rest of the file can be filled in afterwards.

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

See Adding a Transaction

2. Put the Agents on It

Assign both sides where you have them. This is what credits production correctly and what lets each agent open the file and upload to it.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

3. Add a Checklist by Hand

For the deal that matches no rule, or for a template you built after the transaction already existed. Most checklists arrive on their own once the rules are set.

Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.

See Applying a Checklist

4. Put the Paperwork on the File Yourself

Drag a stack in from the transaction and each doc lands with its name and permission category set as you go, up to twenty-five at a time. Upload from Unassigned instead when the transaction does not exist yet.

Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

See Uploading Docs

5. Let the Agent Send the Paperwork In

Each agent has their own maildrop address for every transaction. A document forwarded there is recorded as theirs and arrives already pointed at the file, and the email itself stays on the deal.

Send or forward a message to the transaction it belongs to. Pipeline keeps the message on the file and sends its docs to Unassigned, already pointed at that transaction.

See Your Transaction Maildrop Address

6. See What the Agent Has Finished

An agent's check marks the task done on their end and moves it to your list. Filter the Tasks page by Agent Checked and you are working the office's finished items first.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See Agent Checked Tasks

7. Keep the File Current

Edit Transaction is where the status, the dates, and the price change as the deal moves. Fields your office has locked show but do not take an edit.

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

See Transaction Details

8. Take a Second Offer on the Same Listing

When a contract dies and another comes in, New Offer opens a separate, linked transaction carrying the listing paperwork over. Use it for second and later offers, never the first.

Restart a deal or take the next offer as a new transaction, linked to the one before it.

See New Offers

9. Let Finished Deals Leave the List

Closed, Fell Through, and Auto Expiry drop a deal off the default list and into the next monthly backup. If a finished deal is still showing, the fix is the status's category, not its name.

Finished deals should drop off your list on their own. If they aren't, the fix isn't the status name — it's the category behind it.

See Keep Your Active Transactions List Clean

See the Whole Deal in One Pass

The loop above is the admin's half of a transaction. To see the same deal from the listing agreement to the CDA, with the agent's side, the signatures, and the commission in one run, walk it 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