Keep Rejected and Backup Offers on File

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Compliance says keep every signed offer, even the ones nobody accepted. Doc Labels let you keep them on the listing and still tell them apart at a glance.

Introduction

Five offers come in on a listing. One gets accepted. The other four are signed documents your broker has to be able to produce if anyone asks — so deleting them isn't an option, and neither is leaving them in an inbox.

The obvious move is a transaction per offer, and that's where offices get into trouble: your transaction count is what you pay on, and four dead offers on every listing inflates it fast. It also fills your active list with deals that were never deals.

What works is smaller than that. Leave the offers on the listing transaction where they were received, tag them so they read as rejected at a glance, and let sorting do the separating. Bigger variations exist for offices that genuinely need a separate home, and they're at the end. But start here, because most offices never need them.

When to Use This

- You have to retain rejected or backup offers for compliance and don't want to create a transaction for each one.
- Your transaction count is climbing because of offers that never went anywhere.
- Multiple offers came in on one listing and you need to keep them straight for a future dispute.
- You went looking for a folder — or a "Rejected" document category — and found neither.
- A deal fell through and its paperwork needs to stay on file without confusing the next contract.

Why This Beats a Transaction Per Offer

A transaction is a deal. When you use one to hold something that isn't a deal, two things break at once: you're billed for it, and every count you report — units, volume, pipeline — carries offers that never closed. Offices have tried to solve this with a custom transaction status, and it makes the reporting worse rather than better, because the transaction still exists and still counts.

A label costs nothing, changes no permissions, and is visible from every list a doc appears on. The rejected offers stay attached to the property they were made on, which is exactly where anyone looking for them a year from now will think to look.

1. Leave the Offers on the Listing Transaction

Upload or maildrop each offer onto the listing it was made on, the same as any other document. That's the whole filing decision — there's nowhere else in Pipeline for a document to live, and the listing is the honest home for an offer on that property.

Don't try to solve this with a permission category. The categories are fixed, they exist to decide who can see a document, and repurposing one to mean "rejected" changes visibility as a side effect. Labels are the layer built for exactly this.

2. Name a Label for Them

Pick a color and give it the meaning your office uses out loud — *Rejected Offer*, *Dead Offer*, *Backup Offer*. If you receive several on one property and need to tell them apart, a second label numbered *Offer #1*, *Offer #2* does that too.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See Doc Labels

3. Find Them Again by Label

Sort a transaction's doc list by its Label column and every offer wearing the same color lines up together, separated from the executed contract without being hidden from it. To narrow rather than sort, type the label's name into the transaction's **Search docs** box and only those docs remain on screen.

The same label is visible in Unassigned and on the Unreviewed page, so it also tells whoever is filing that a doc doesn't need the same scrutiny as a live contract.

4. Group One Offer's Documents Into a Single File

An offer is rarely one page. When a rejected offer arrived as a contract plus four addenda, combine them into one named PDF so the transaction's doc list stays readable — *Rejected Offer — 123 Main*, one line instead of five.

Combine several PDFs on a transaction into one clean document, named the way your office names things.

See Doc Merge

5. Give Them a Separate Home if You Really Need One

Some offices want the rejected offers out of the listing file entirely — usually because their brokers review by transaction and don't want dead paper in the same list. Three shapes come up, all of them workable:

- **One catch-all transaction per agent**, named for the agent, holding their rejected offers for the year.
- **One catch-all per year** for the whole office, replaced each January.
- **One transaction per buyer**, tracking every offer that buyer made — and renamed to the property address if one of their offers is finally accepted.

Whichever you pick, put it in a Fell Through status so it stays off your active list and out of your production numbers, while still being included in your monthly backup.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses