# Move Documents to the Right Transaction

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Two transactions got created for one deal, and the paperwork is split across both. Pipeline can't merge them, so you move the documents instead — and everything survives the move.

## Introduction

It happens in every office. The listing agent starts a file, the buyer's agent starts another one for the same property, and by the time anybody notices there are docs on both. Or a scan went onto the transaction directly above the right one and nobody caught it for a week.

The first question is always the same: can you merge the two transactions? No. That answer hasn't changed since 2013, so it's worth taking off the table early. What Pipeline gives you instead is a doc that can be lifted off one transaction and put onto another without being deleted, re-scanned, or losing its name.

So the work is: pick which transaction survives, move the docs across, and clean up what's left. None of it is hard. The part that trips people up is doing it in an order that leaves a duplicate transaction sitting on your active list forever.

## When to Use This

- Two transactions exist for one property and you want to combine them into one.
- A document was uploaded or assigned to the wrong transaction.
- An agent created a sale file by hand instead of using New Offer, and now it isn't linked to its listing.
- You're looking for a merge button and can't find one.
- A whole file's worth of docs needs to move at once and you don't want to do it one at a time.

## Why This Beats Waiting for a Merge Button

The instinct is to ask us to merge the two files, and it's a fair instinct — the deal really is one deal. But a transaction isn't a folder. It carries a name, a status, agents, a checklist, commission figures, and its own history, and there's no honest way to fuse two of those into one without something being silently overwritten.

Documents, on the other hand, move cleanly. Unassigning a doc sends it back to the queue with its file and its record intact, and assigning it again gives it a new home, a name you confirm, and a permission category you choose. Move the docs and delete the emptied shell, and you end up with exactly the single, correct transaction you wanted — with a trail showing how it got that way.

## 1. Decide Which Transaction Survives

Before anything moves, pick the keeper. The one to keep is usually the one with the checklist already applied, the correct agents assigned, and the commission work started — not necessarily the one created first.

Write down the name of the keeper and the name of the one you're emptying. Every step after this points in one direction, and reversing it halfway is how docs end up scattered across both files again.

## 2. Move the Documents Across

Moving a doc is two moves: send it back to the queue from the transaction it's on, then file it onto the one you're keeping. On the wrong transaction, click the gear beside the doc and choose **Unassign Doc**. The doc lands back in Unassigned, ready to be filed again.

From there it's an ordinary assignment — the same three decisions you'd make on any doc arriving for the first time.

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See Doc Assignment

> Reassigning beats deleting and re-uploading. The doc keeps its file, its name and its record, and the move itself is logged, so anyone who wonders later where a document went can find out.

## 3. Move a Big Batch in One Pass

Two dozen docs is a lot of unassigning. There are two shortcuts, and which one fits depends on how much you care about the original upload record.

The first is to download the whole file and put it back: use **Download Transaction** on the transaction you're emptying to pull every doc down at once, then upload them onto the keeper. Fast, but the docs arrive as new uploads added by you.

The second is to email them across. Open Note/Email on the transaction holding the docs, attach them, and send them to the keeper's own maildrop address — keep each email under 5MB, because past that most mail servers turn attachments into links and a link isn't a document.

Email your documents to a maildrop address and Pipeline pulls the attachments in — no logging in, no uploading.

See Maildrop

## 4. Delete the Emptied Duplicate

An empty duplicate left on your list is worse than the original problem — it's the file somebody will upload to next month. Once the docs are across, a master admin deletes it from the transaction itself.

> A transaction created and deleted inside the same billing cycle doesn't count against your quota, so an accidental duplicate caught quickly costs you nothing.

If deleting isn't the right call — the file has history you want to keep — move it to a status that takes it off your active list instead.

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

See [Transaction Statuses]

## 5. Link a Standalone Sale Back to Its Listing

One version of this problem isn't a duplicate at all. An agent created a sale transaction by hand instead of clicking New Offer on the listing, so the two files are correct but unrelated — and you lose the link between them for reporting and for finding one from the other.

Going forward, New Offer is the move that prevents this: it spins the sale off the listing already connected, and carries the listing-side docs over for you.

Restart a deal or manage multiple offers without starting over — New Offer gives you a clean, linked transaction.

See [New Offers]

> For a sale that's already been created standalone, email us. We can sometimes attach it under its listing as a New Offer after the fact — send both transaction names and tell us which is which.