Adding a Transaction FAQ

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Adding a transaction takes a name, an MLS or Transaction Number, a status, and the agents on the deal. Answers to the common questions about who can add transactions, the keyboard shortcut, and what's required to save.

Who can add a transaction?

Admins, and agents who have the "Create transactions" permission. If you're an agent without that permission, ask an admin to add the transaction or to grant you the permission from Manage Users.

Is there a keyboard shortcut for adding a transaction?

Yes — Ctrl + Alt + T on Windows, or Ctrl + Option + T on a Mac.You can also click [Add Transaction] in the upper-right corner of any page.

What information is required to save a transaction?

A Status and a Label are required; most other fields are optional. Enter the name, dates, prices, and agents you have now, and fill in the rest later by editing the transaction.

Why is the Add Transaction button missing for me?

You haven't been granted the "Create transactions" permission. An admin can add it from Manage Users, or add the transaction for you. See Why Can't I Add a Transaction?

Why does a new transaction already have checklists or documents on it?

An auto-assigned checklist template added them. Admins can set checklists to apply automatically based on a transaction's status, label, or side, and those tasks and any attached documents come in when the transaction is created. An admin can adjust which templates auto-apply.

Learn More

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

See Adding a Transaction

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.