Adding a Transaction

Last Modified on 09/04/2026 11:14 am EDT

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

Introduction

A deal becomes real somewhere between the signature and the paperwork, and the first thing anyone in the office does about it is open a file for it. In Paperless Pipeline, that file is a transaction.

A transaction is the container for one listing or one purchase, and everything the deal produces ends up inside it. Creating one is how that starts. It takes very little to open a file, which is deliberate: a deal at the beginning is mostly unknowns, and a form that demanded all of them would stop the person entering it before the work had begun. Plenty of offices open the transaction the day the agreement is signed and let it fill in from there.

So the deal has somewhere to live from day one, and the documents that arrive over the next month land on it instead of piling up in an inbox. You can start one from any page, so opening a file doesn't cost you whatever you were already doing. And if a field is blank because nobody knows the answer yet, leave it. Coming back to a transaction is how it's supposed to go, not a correction.

How It Works

Adding a transaction takes a location, a name, and whatever listing, contract, and commission details you have — then you assign the agents on the deal and save.

Start From Any Page

The [? Add Transaction] button sits in the upper-right corner of any page, so you can start a new transaction without leaving what you're doing. There's also a keyboard shortcut — Ctrl + Alt + T on Windows, or Ctrl + Option + T on a Mac.

What You'll Enter

A transaction takes a location, a name, an MLS or Transaction Number, a Status, and a Label — plus whatever dates, prices, commission, and agents you have. Every field is described below, under *Add a Transaction*. You only have to fill in the fields your office requires before you save.

Put the Agents on the Deal

In the Assign Agents section you add the in-house agents on the deal and check whether each is on the Listing or Buying side — this is also what lets Pipeline detect the transaction's side for you. See Transaction Sides. If agents from another company are involved, you can add them as outside (co-op) agents for reference; they don't get access to the transaction.

Fill In the Rest Later

You don't have to complete everything now. Save with what you have, then add or change details any time from the transaction itself. See Transaction Details.

Add a Transaction

Add a new transaction to start tracking it in your company's account.

Who Can Do This: Admins, and agents with the "Create transactions" permission.

To add a transaction:

1. Click [Add Transaction] from the upper-right corner of any page. (Or use the keyboard shortcut — Ctrl + Alt + T on Windows, Ctrl + Opt + T on a Mac.)

2. Add the information you have available for the transaction (outlined below), then save.

Location

Select the **Location** associated with the transaction, if your account has more than one.

Transaction Name or Property Address

Enter the **Transaction Name** according to your office's preferred naming convention. See Transaction Names.

MLS or Transaction Number

Enter the **MLS or Transaction Number**.

Status

Select the **Status** that best describes the current stage of the transaction.

Label

Select the **Label** that best applies to the transaction.

Listing, Expiration, Acceptance & Close Date

Select or enter the **Listing Date**, **Expiration Date**, **Acceptance Date**, and **Close Date** in mm/dd/yy format.

Contingency Dates

Select or enter any **Contingency Dates** in mm/dd/yy format.

Additional Information

Complete any **Other Information** or **More Info** your office asks for.

Admin Info

Admins only — enter any **Admin Info** that agents shouldn't see.

Seller Name & Lead Source

Enter the **Seller Name** and **Seller Lead Source**, if applicable. Optionally add the seller as a contact by clicking [add seller as contact], then entering their address, email, phone, and fax or other.

Buyer Name & Lead Source

Enter the **Buyer Name** and **Buyer Lead Source**, if applicable. Optionally add the buyer as a contact by clicking [add buyer as contact], then entering their address, email, phone, and fax or other.

List Price

Enter the current **List Price**.

Sale Price

Enter the **Sale Price** if the property is already under contract.

Total Commission

Enter the estimated **Total Commission**.

Commission Summary

Elaborate on the commission in the **Commission Summary**, if necessary.

Assign Agents

In the **Assign Agents** section, add the in-house agents on the transaction. For each agent, search for their name or find it in the list, then check the **Listing** or **Buying** box next to it — assigned agents appear on the right. To add an assistant, add them as an agent, then click [make assistant] next to their name; assistants appear in the *Assigned Assistants* section. See Assign Agents.

Outside (Co-op) Agents

If agents from another company are involved, check [This transaction has outside (co-op) agents], then enter the Outside Listing Agent or Outside Buying Agent's name, email, and phone. Pipeline records them for reference, and they don't get access to the transaction. See Outside (Co-op) Agents.

Pipeline saves the transaction and puts it on your Transactions list, where you can add checklists, upload docs, and bring in contacts. To change anything later, see Transaction Details.

Stop Retyping the Same File

Some offices open the same shape of file over and over — a subdivision of near-identical lots, the same builder every quarter, a management company whose paperwork never changes. Keying all of it in each time is work you can skip, and it's the feature people are most surprised to learn they already have.

Reuse an existing transaction as the starting point for a new one.

See Transaction Duplication

Adding a Transaction FAQ

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. See Adding a Transaction FAQ, or Why Can't I Add a Transaction? if the button is missing.

Adding a Transaction Troubleshooting

Running into a problem? Start here.

- Why Can't I Add a Transaction?

Ways to Use Adding a Transaction

See Adding a Transaction at work inside a bigger job:

- Load Your Past Transactions Into a New Account