Control What Carries Over to a New Offer

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A New Offer copies almost everything. The permission category on each document is what decides the exceptions — and it works in both directions.

Introduction

The rule is short enough to memorize: a New Offer brings the listing side across and leaves behind anything filed in the **Sale** or **Buyer** permission category. Everything else travels: the agents, the contacts, the listing documents, the notes, the More Info.

That single rule is also the control. If a document shouldn't travel, put it in one of those two categories before you click. If it should, make sure it isn't. Most of the frustration around New Offer comes from not knowing that the lever exists, and then deleting documents out of the new transaction one by one afterward.

When to Use This

- The dead buyer's disclosures and addenda came across to your new offer and shouldn't have.
- You're about to spin off a New Offer and want to sort the documents first rather than clean up after.
- Something you needed on the new transaction stayed behind on the original.
- You've been deleting unwanted documents out of every New Offer and want to stop.
- Your buyer's deal collapsed and you're not sure whether their paperwork will follow them to the next property.

Why This Beats Cleaning Up Afterward

The instinct after a New Offer is to open the new transaction and start deleting — it works, and it's what most offices do the first few times. The trouble is that it's per document, per offer, forever, and a listing that goes through three buyers means doing it three times.

Sorting first is one bulk edit on the original, and it holds for every New Offer that transaction ever spawns. Same amount of thinking, done once.

1. Learn What Travels and What Doesn't

A New Offer arrives carrying the side, the location, the label, the seller, the list price, the listing agents, the contacts, your More Info and Admin Info, the listing documents, the notes, and the listing checklists. It leaves behind the sale price, the transaction dates, the buyer, and anything filed as a Sale or Buyer document — all the things that belong to the deal that died.

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

See New Offers

2. Seal the Original First

Move the original into a status in the **Fell Through** category before you spin anything off. It keeps that deal's history where it happened, takes it off your active list, and is what makes the New Offer option available in the first place.

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

See Transaction Statuses

3. Move the Documents That Shouldn't Travel

Now go through the original's documents with one question: is this the listing's, or is it the departed buyer's? The buyer's disclosures, their addenda, the termination itself — those go into the **Sale** or **Buyer** category, and they'll stay put when you spin off.

You don't have to do it one at a time. Select the documents with their checkboxes and change the category on all of them at once.

Two things decide who can see a document: whether the person can get to the transaction it lives on, and which permission category the doc was filed under.

See Document Access

> The category is doing two jobs at once here — deciding who in your office can read the document, and deciding whether it travels. Leave anything genuinely admin-only in **Office** or **Private**; those categories aren't part of the carry-over rule, so the document comes across with its restriction intact.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

4. Create the Offer

With the sorting done, the spin-off is the easy part. Name the new transaction so you can tell it from the original at a glance, and pick whether checklist tasks and notes come along.

A contract dies, the property goes back on the market, and every page of listing paperwork is still perfectly good. New Offer moves you forward without rebuilding the file.

See Deal Falls Through, New Offer on the Same Listing

> Buying-side transactions are handled for you. When the original is buyer-side only, Pipeline detects it and carries the buyer's fields, contacts, and documents across instead of the listing's — no special steps, and the first five New Offers from a transaction still don't count against your quota.

5. Clean Up Anything That Slipped Through

If something did come across that you'd rather wasn't there, delete it from the New Offer. That has no effect on the original — the two transactions hold separate copies — so the record of the dead deal stays complete.

Delete a doc and it doesn't vanish. It lands in *Deleted Docs*, where it stays for a year with a record of who removed it and when.

See Deleted Docs