New Offers

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

Introduction

A buyer walks two weeks before closing and the listing goes back on the market. The instinct is to reach into the transaction and turn it back into a listing, wiping out the deal that just died so the file matches today.

That's the move New Offer saves you from. A transaction is a record of what happened, and rewriting one to fit the next attempt costs you the history of the last one, along with the checklist somebody already worked through. New Offer takes the original as it stands, carries forward the part that's still true for your side of the deal, and starts the next round in a separate transaction linked back to it. The original closes out honestly. The next attempt starts clean.

So a fall-through, a relist, or three offers on the same house stops being a filing problem. Each attempt gets its own timeline, its own tasks, and its own documents, and the files point at each other, so a year later the whole story still reads in order. Nothing you already did has to be undone to make room for what comes next.

How It Works

New Offer is smart duplication: it starts from the original, brings over what still applies to your side, and links the two together.

What Carries Over

New Offer pulls in only what's relevant to your side. On the listing side, that's your listing agents and seller-specific info and docs; on the buying side, your buying agents and buyer-specific info and docs. You can optionally copy checklist tasks (except those visible only to the other side) and notes. You keep what's useful and skip the clutter from the other party.

Linked Transactions

Each New Offer is a standalone transaction with its own timeline, tasks, and documents. It links back to the original, and the original links to every related New Offer — so tracing the full history and switching between them stays easy.

Quota-Friendly

The first five New Offers created from a single transaction don't count toward your company's monthly quota, so you can manage fall-throughs, backups, and multiple offers without worrying about usage.

Keeping New Offers Clear

Give each one a unique name — adding the offer number or client name helps, like "123 Main (#2)". Use the original transaction for the first offer, and create a New Offer only for the second and beyond. Keep statuses accurate so progress stays visible at a glance.

Create a New Offer

> Start a New Offer from the [New Offer] link on the open transaction.

> **Who Can Do This**: Anyone with the "Create transactions" permission.

To create a New Offer:

1. Open the transaction you want to base the new offer on.
2. Click [New Offer] from the left menu.
3. Give the new offer a unique name and select the appropriate status.
4. Optionally, check "Copy over all checklist tasks" and "Copy over all notes" to bring those along.
5. Click [Create Offer].

The new transaction is live and linked to the original, ready for you to work the next steps.

Find Related Transactions

> Jump between an original transaction and its New Offers using the related links on the transaction.

> **Who Can Do This**: Anyone who can view the transaction.

To find related transactions:

1. Open the original transaction or one of its New Offers.
2. Look in the Seller & Buyer section for the related transaction links.
3. On a New Offer, click the link back to the original; on an original, click the link to any related New Offer.

You'll move straight to the linked transaction without hunting through your list.

Decide Which Documents Follow

Anything filed in the **Sale** or **Buyer** permission category stays behind on the original; everything else travels. Sorting the documents before you spin off is one edit on one transaction — deleting the dead buyer's paperwork out of every offer afterward is not.

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]

New Offers FAQ

New Offer copies your side's details into a fresh, linked transaction. Answers to the common questions about how it differs from duplicating, the monthly quota, and why the button may not appear. See [New Offers FAQ].

Ways to Use New Offers

See New Offers at work inside a bigger job:

- [Deal Falls Through, New Offer on the Same Listing]