Transaction Details

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See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

Introduction

Everything about a deal has to live somewhere. In Paperless Pipeline it lives in one place: open a transaction and the whole file is in front of you, from the dates the deal runs on to the documents that prove it happened.

A transaction is a container rather than a form. It gets created early, usually before half the information exists, and it fills in as the deal moves. That's why viewing and editing are separate steps. The page you open is the summary everyone reads, and changing something is a deliberate move rather than something that happens by clicking into a field. It catches people out at first, because the details you're reading aren't the details you type into.

One page answers most of what anyone asks about a deal, and it keeps up as the deal changes under it. If you go to update a detail and Pipeline doesn't let you, that's normal rather than broken; what you can edit depends on your role and on how far along the deal is, and your office admin can make the change for you.

How It Works

Open a transaction and you'll see its details laid out in sections; the [Edit Transaction] link lets you change them.

What's on the Page

The Info sections at the top show the transaction's key dates and details — listing, contract, and commission. Below that, you'll find the Listing and Buying Agents involved, the Checklists and Tasks, the Contacts, the Docs, and the Notes and Sent Emails. Each section shows what your role gives you access to.

Open It From Your List or a Search

Open a transaction by clicking its name or property address — from your Transactions list for active deals, or by searching for inactive ones. What you can see depends on your role: agents see the transactions they're on, and admins can see all transactions in a location.

Edit From the Open Transaction

To change any of the details — a date, a price, a status, an agent — open the transaction and click [Edit Transaction]. Update what you need and save.

Why Some Fields Are Locked

Which fields you can edit depends on your role and your office's setup. Some fields are admin-only. If you need to update a field and can't, ask your admin to make the change for you.

Add a Transaction

Add a new transaction to start tracking it in your company's account. Every field is described in Adding a Transaction.

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 in Adding a Transaction — then save.

Pipeline creates the transaction and opens it, so you can fill in the rest of the details.

View a Transaction

Open a transaction to see its dates, agents, checklists, docs, and contacts in one place.

Who Can Do This: In-house agents added to the transaction, and admins with permission to view transactions in that location.

To view a transaction:

1. Find the transaction — on your Transactions list for active deals, or by searching for an inactive one.

2. Click the Transaction Name or property address to open it.

3. Review each section: Info, Agents, Checklists & Tasks, Contacts, Docs, and Notes & Sent Emails.

You'll see everything on the transaction that your role gives you access to.

Edit a Transaction

Update a transaction's details with the [Edit Transaction] link on the open transaction.

> **Who Can Do This**: Agents added to the transaction, and admins.

To edit a transaction:

1. Open the transaction you need to update.
2. Click [Edit Transaction] from the left menu.
3. Add or change any information — dates, prices, status, agents, or contacts.
4. Save your changes.

Your updates appear on the transaction right away. If a field you need is locked to admins, ask your admin to update it for you.

Transaction Details FAQ

What you can see and change on a transaction depends on your role. Answers to the common questions about who can view and edit, admin-only fields, and finding inactive transactions. See Transaction Details FAQ.