Transaction Duplication FAQ

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Duplication copies an existing transaction into a new one you can adjust. Answers to the common questions about who can duplicate, what gets copied, and duplicating versus creating a New Offer.

Who can duplicate a transaction?

Admins. The [Duplicate] option lives on each transaction's gear menu on the Transactions list.

What gets copied when I duplicate a transaction?

The transaction's details, plus whichever of docs and checklists you choose to bring along. Copied docs get new upload dates with no review or comment activity, and copied checklists come across with no activity. If you don't copy checklists, any checklists set to auto-apply are still added.

Should I duplicate or create a New Offer?

Duplicate to reuse a transaction; use New Offer to re-list or add another offer on the same deal. Duplication is great for templates or a parcel of similar properties. New Offer is built for fall-throughs and multiple offers — it copies only your side's details and keeps the two transactions linked. See New Offers.

Is a duplicate linked to the original?

No — a duplicate is a standalone transaction. Unlike a New Offer, it isn't automatically linked back to the original, so use duplication when you want a fully independent copy.

Learn More

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

See Transaction Duplication

Still Have Questions?

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