Transaction Duplication

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

Introduction

Some transactions are almost the same transaction. Twenty lots in one subdivision, or every file you open for the same builder, differ by an address and not much else. Typing the same details in twenty times is work nobody should be doing.

Duplicating starts a new transaction from one that already exists, with the parts you choose carried across. It's the closest thing Pipeline has to a template: set one transaction up the way your files ought to start, with the usual agent on it, the standard forms already uploaded, the contact you always use, then copy it whenever you need another. The copy is a full transaction from the moment it's created rather than a draft, so it behaves like everything else in your account.

The twentieth file starts where the first one ended, and they all come out consistent because they all came from the same one. The thing to keep straight is which job you're doing. Duplication makes an independent file with no tie to the original, which is right for a template or a batch of similar properties, and wrong for a second run at a deal you'd rather keep linked.

How It Works

Duplication starts from the Transactions list and lets you choose which pieces of the original to bring along.

When to Duplicate

Reach for duplication when you want a fresh transaction that mirrors an existing one — a reusable template, a batch of similar properties, or a clean restart. If you're re-listing or adding another offer on the same deal, use New Offer instead, which keeps the two linked. See New Offers.

What You Can Copy Over

As you duplicate, you can choose to copy over all docs and all checklists. Copied docs come across with new upload dates and no review or comment activity; copied checklists come across with no activity. If you leave checklists unchecked, any checklists set to auto-apply will still be added to the new transaction.

Finishing the Copy

After the copy is created, you add or update whatever's different — dates, prices, agents — and save. From there it behaves like any other transaction.

Duplicate a Transaction

> Duplicate a transaction from its gear menu on the Transactions list.

Who Can Do This: Admins.

To duplicate a transaction:

1. Click [Transactions] from the top menu to go to the Transactions list.
2. Click the transaction's [Gear], then [Duplicate].
3. Update the Transaction Name for the copy, if needed.
4. Check the items you want to bring along: [Copy over all docs] and/or [Copy over all checklists].
5. Click [Duplicate Transaction] to create the copy.
6. Add or update any new information for the copied transaction, then save.

The new transaction is created from the original, with the docs and checklists you chose to copy.

Transaction Duplication FAQ

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. See Transaction Duplication FAQ.