Transaction ID

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Every transaction carries identifying numbers that tell it apart from every other one in your account.

Introduction

Two deals on the same street, or the same client buying twice in a year, and the name alone stops being enough to tell them apart. The number you already use for that deal somewhere else is what closes the gap.

Alongside its name, a transaction carries a reference number. It's one field and you fill it in yourself, which is deliberate: some offices track deals by MLS number, some by an internal file number, some by whatever the brokerage has always used, and Pipeline doesn't try to choose for you. Whatever goes in there is the number your own office already recognizes.

So a Paperless Pipeline transaction stops being a record that lives only in Pipeline. When you're reconciling against your MLS, handing a file number to a bookkeeper, or separating two deals that share an address, the number is on the deal and stays with it. It isn't required, either, so a blank one costs you nothing more than searching by name instead.

How It Works

The identifier is a field you fill in, so it always matches whatever number your office uses.

The MLS or Transaction Number

When you add a transaction, the MLS or Transaction Number field holds the reference number for the deal. Enter the MLS number, an internal file number, or whichever identifier your office tracks — it's stored on the transaction and shown when you view or edit it.

Using It to Find a Transaction

The number is saved on the transaction, so it travels with the record and shows up in your Transaction Spreadsheet — handy when two deals share a similar address, or when you're matching Pipeline against another system. See Transaction ID FAQ for how to track one down by its number.

Add or Update the Transaction Number

> Set or change the MLS or Transaction Number from the [Edit Transaction] link on the open transaction.

> **Who Can Do This**: Admins. An agent can't change the MLS or Transaction Number on an existing transaction, whatever their other permissions.

To add or update the transaction number:

1. Open the transaction.
2. Click [Edit Transaction] from the left menu.
3. Enter or update the MLS or Transaction Number.
4. Save your changes.

The number is saved on the transaction and available whenever you view or search for it.