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.

Frequently Asked Questions

Can agents edit the MLS or Transaction Number after a transaction is created?

No — only admins can. Agents can enter the number when they first add the transaction, but once it's saved, changing it is restricted to admins for security. Ask your office admin to make the update; their contact info is on the left menu of your Home page under Admin & Support.

The deal fell through and the number is already in use — how do I start over?

Use New Offer on the original transaction rather than Add Transaction. Move the original to a Fell Through status, open it, and click [New Offer] — it creates a linked transaction that carries the same number over without a conflict, and the first five New Offers on a property don't count against your monthly transaction quota.

Restart a deal or take the next offer as a new transaction, linked to the one before it.

See New Offers

Can the same MLS number be used on more than one transaction?

No — each number can be used once, unless the second transaction is a New Offer. Pipeline is built to handle both sides of a deal on a single transaction, so the block exists to keep one property from being tracked twice by mistake; when both sides are in-house, an admin adds the second agent to the transaction that already exists.

Is the MLS or Transaction Number required?

No — it's optional, and there's no way to make it mandatory. Leave it blank when there's no MLS number, as with a For Sale By Owner listing. Offices that want agents prompted for it often add a checklist task due on transaction creation, though that's a reminder rather than a hard gate.

Can I give an agent permission to edit the number?

Only by granting admin-level access. There's no agent-level permission for this field on its own — checking **View all transactions for this location** in the agent's user profile grants the admin-level access that includes editing it, so weigh it against everything else that permission opens up.

Why can't I find past transactions by their MLS number?

The transaction list doesn't look transactions up by number — the Transaction Spreadsheet does. Download the year's Transaction Spreadsheet, which lists every transaction created that year along with its number, and search or sort from there. Our support team can't look transactions up by number either, since every transaction is entered and managed by your own office — your admin is the fastest route.