Transaction Names FAQ

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You choose a transaction's name and can change it any time. Answers to the common questions about renaming, whether the name has to be an address, and the name versus the MLS number.

Can I rename a transaction?

Yes. Open the transaction, click [Edit Transaction], update the Transaction Name field, and save. The new name shows everywhere right away.

Does the name have to be the property address?

No — it can be whatever fits your office's convention.Most offices use the property address, but a client name, MLS number, or another label works just as well. Consistency across your team is what matters.

Why do I see instructions under the transaction name field?

Your admin added naming instructions to keep names consistent.That help text is set at the company level to guide everyone toward the same format.

What's the difference between the name and the MLS or Transaction Number?

The name is how you recognize the deal; the MLS or Transaction Number is a separate identifier field.You can fill in both — the name shows on your list, and the number is stored on the transaction for reference.

Learn More

A transaction's name is how you'll recognize it at a glance — set it to match your office's convention.

See Transaction Names

Still Have Questions?

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