Transaction Names

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

Introduction

A busy Transactions list is mostly names. You scan it, you read addresses, and how fast you land on the right deal comes down to whether everyone typed them the same way.

You choose the name yourself, and Paperless Pipeline doesn't impose a format. Most offices use the property address because it's what everyone recognizes; a client name or a listing number works just as well. What matters more than the format is that the office agrees on one, because the name is the handle your whole team reaches for whenever a deal comes up. That's also why changing a name later is treated more carefully than editing an ordinary field. Rename a deal and you've changed how everyone else finds it.

A typo in a name is worth fixing, and fixing it takes a moment. If you can't make the change yourself, nothing is misconfigured in your account and you haven't done anything wrong; renaming is handled differently on purpose, and your office admin can put it right. Once the corrected name is saved, that's the name everyone sees from then on.

How It Works

You set the name when you create a transaction, and you can change it any time by editing the transaction.

What the Transaction Name Is

The Transaction Name (also shown as the property address) is the label that identifies the deal across Pipeline — on your list, in search results, and on the transaction page. It's separate from the MLS or Transaction Number, which is its own field.

Your Office's Naming Convention

Names work best when everyone follows the same format. To help with that, admins can add naming instructions that appear right below the name field when someone creates a transaction — a small nudge to keep names consistent. Setting up those instructions is a company-level setting (see Customizing Transactions).

Changing a Name Later

If a name needs to change — a corrected address, a clearer label — you update it by editing the transaction. See Transaction Details.

Rename a Transaction

Change a transaction's name with the [Edit Transaction] link on the open transaction.

Who Can Do This: Admins. Your office can also let buying agents rename their own buying-side transactions — see

below.

To rename a transaction:

1. Open the transaction you want to rename.
2. Click [Edit Transaction] from the left menu.
3. Update the Transaction Name or property address field.
4. Save your changes.

The new name shows immediately on the transaction, your Transactions list, and in search.

Letting Agents Rename Their Own Buying-Side Transactions

By default, renaming is an admin job — which is deliberate, since the name is how everyone finds the deal. If correcting agents' typos is eating your day, there's a company setting that hands part of it back: turn on **Allow agents to edit transaction names** under [Admin / Settings] → Transaction Settings, and buying agents can rename their own buying-side transactions themselves.

Two limits worth knowing before you turn it on. It only reaches **buying-side** transactions — a listing-side name is always admins-only, and no setting changes that. And an agent can only rename the transaction **until it moves to a Pending status**; after that it's back to you.

Get the Whole Office Naming Files the Same Way

Agreeing on a format is the easy half. Nobody reads the email about it twice, and a month later half your list is addresses and half is client names.

Show your team a naming reminder right under the transaction name field, so files are named your way every time.

See Transaction Naming Instructions

Frequently Asked Questions

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.