Get Every Transaction Named Your Office's Way

Last Modified on 09/04/2026 11:15 am EDT

Half your files are addresses and half are client names, and neither the MLS audit nor the new admin can find anything. One setting and one decision fix it going forward.

Introduction

Pipeline's transaction name field is the address field — it's what searches look through, what sorts your list, and what an auditor reconciles against the MLS. Offices that name by client name instead find that out during their first audit, when nothing lines up.

The enforcement Pipeline offers is deliberately light: an instruction line that appears directly under the name box while someone is typing into it. That's the whole mechanism. It works well, because the reminder arrives at exactly the moment the decision is being made.

When to Use This

- Your transaction names are inconsistent and searching for a property is a guessing game.
- An MLS or state audit needs your files to reconcile against property addresses.
- New agents keep naming files their own way and nobody told them otherwise.
- You need the state and zip code in the name for a compliance requirement.
- Agents keep asking you to rename transactions and you want a cleaner process for it.

Why This Beats Naming by Client

Naming a file after the client feels natural — it's how agents think about their deals, and it's who they'll ask you about later. The problem shows up somewhere else entirely. Every external record of the transaction is keyed to the property: the MLS listing, the county record, the title order, the audit request. A file named *Henderson* can't be matched to any of them without someone opening it.

The address works in both directions. Your agents still find their deals — Global Search reaches the seller and buyer names too — and everyone outside your office can find them as well.

1. Write the Naming Instructions

A master admin sets the instruction text in your company settings, and it appears as a reminder right under the name field on every new transaction. Keep it to an example rather than a rule: *Enter the full property address, e.g. 1420 Oak Street, Austin TX 78704* teaches faster than a paragraph about conventions.

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

See Transaction Naming Instructions

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

See Transaction Names

2. Say What to Do Before There's an Address

Every convention meets the same edge case: a signed buyer representation agreement with no property attached to it yet. Agents will improvise unless you tell them what to do, and improvisation is what breaks the convention.

Decide the placeholder your office uses and put it in the instruction text, so the exception is as documented as the rule.

The agreement is signed. There's no property yet, no address, no seller. So what do you call the file?

See Store Buyer Broker Agreements Before You Have an Address

3. Decide Who Handles Renames

Agents generally can't rename a transaction. What they can do — and what Pipeline intends them to do — is email an admin from inside the file to ask, which arrives with the transaction attached so there's no ambiguity about which one they mean.

Offices that get a lot of these name one admin as the owner of rename requests. It stops the same file being renamed twice in different directions and keeps the convention with someone who knows it.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

> The permission that would let an agent rename transactions is the admin-level **view all transactions** permission for that location — which also shows them every deal in the office. It's rarely the right trade for saving a few emails. See User Permissions.

4. Keep Numbers Out of the Name

Reference numbers, state transaction numbers, your accounting system's ID — none of them belong in the transaction name, where they push the address off the end of the column. They belong in the MLS or transaction number field, which takes several numbers separated by a forward slash and splits them into their own columns when you download a spreadsheet.

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

See Transaction ID