Build a Transaction From the Listing Agreement

Last Modified on 09/04/2026 11:19 am EDT

The signed listing agreement already holds the property, the sellers, the dates, and the price. Hand it to Pipeline and the file builds itself while you check the work.

Introduction

New listing intake is the same twenty minutes every time. Someone opens the signed agreement on one screen and the *Add Transaction* form on the other, and types across what's already written down: address, sellers, listing date, expiration, price, commission, the co-op agent if there is one.

AI Create replaces the typing with reviewing. You give Pipeline the agreement, it fills the form, and your job becomes checking what it pulled against the document — which is the part that needed your judgment anyway. Offices doing this report the twenty minutes coming down to under five, with minor tweaks.

Nothing about it needs configuring. State association forms and your own brokerage intake sheets both work as they are, and nothing saves until you say so.

When to Use This

- A listing agreement just came back signed and somebody is about to retype it into Pipeline.
- Your office runs intake off a listing input sheet or transaction sheet that already has every field on it.
- The contacts are the slow part — sellers, the outside agent, the lender — and you're adding them one at a time.
- Your intake form lives outside Pipeline and there's no connection between it and your transactions.
- You've tried AI Create on one kind of document and want to know what to check before trusting it on the rest.

Why This Beats Waiting for an Integration

The instinct, once you've seen this work, is to ask for the last mile: connect the intake form directly to Pipeline so a submission becomes a transaction with nobody touching it. It's a fair ask and we hear it often. It isn't something you can set up today — that connection would need open API or webhook access, and there isn't any.

What's easy to miss is that the wait buys you almost nothing. Save the submission as a PDF, upload it, and AI Create does the part that was actually costing you time — reading the form and filling the fields. You keep one deliberate step, which is the review, and that's the step you'd have wanted to keep anyway.

1. Pick the Document That Describes the Deal

One document does the work, so choose the one that carries the most of the file in it. For a new listing that's the signed listing agreement. For a pending sale it's the executed purchase contract. If your office runs intake off its own paperwork, the listing input sheet or transaction sheet works just as well.

There's nothing to set up first. State association forms and brokerage intake forms are both read as they come, and a form your sellers filled out somewhere else works once it's saved as a PDF.

2. Put a Split Packet Into One Document First

Listing paperwork rarely arrives as one clean file — the agreement in one email, the disclosure in another, the addendum photographed on a phone. Combine them before you run anything, so Pipeline reads the deal as a whole rather than a page at a time.

Paperwork for one deal rarely arrives in one file. Combine the pieces into a single document right on the *Unassigned* page, before any of it is assigned and before you hand it to AI.

See Merge on Unassigned

> There's a cost reason too. AI is priced per document, so a packet merged into one file is one run, while the same pages run separately are several.

Pipeline AI is priced by the run: one pass over one document, one dollar, and only when someone on your team chooses to use it.

See AI Runs

3. Run AI Create on It

Hand Pipeline the document and it fills the *Add Transaction* form — property and transaction details, the sellers and buyers, the dates including the ones the contract states as day-rules, the financials, and the outside contacts, each matched to a contact you already have where it can be.

Upload a signed contract and a filled-in transaction comes back — *AI Create* does the typing, so you review what Pipeline pulled, add what's missing, and save.

See Pipeline AI Create

4. Keep Working While Pipeline Reads

The read takes about a minute and it doesn't hold you up — start it, go answer something else, and come back when Pipeline tells you it's done. On a morning where four listings land at once, that's the difference between a queue and a pile.

Pipeline reads your document in the background and tells you the moment the result is ready — an in-app notice while you're working, an email when you've stepped away.

See Pipeline AI Notifications

5. Check the Fields a Listing Actually Turns On

Read the filled form the way you'd read an agent's paperwork — looking for the few things that matter rather than every line. On a listing, four of them decide whether the file behaves for the rest of the deal.

The dates. Listing date, expiration, and any contingency deadlines the agreement stated as a rule rather than a date. These drive your checklists, so a wrong one propagates.

The sellers and outside contacts. This is where offices tell us the time really goes — adding people one at a time — and it's the single most-praised part of the result. Check that a contact matched to your existing record is the right person, not a namesake.

The price and the commission. List price and total commission feed your reporting, and a listing agreement can carry more than one number.

The property itself. Address and MLS or transaction number, since those are what everyone will search on later.

> Look hardest at execution dates. A contract's stated date and the date the parties actually signed aren't always the same, and offices have had the two read as one — which then flows into every deadline calculated from it. Confirm that date against the document before you save.

> Results vary by how a document is built. Offices running several document types report AI doing better on some than others, so run one of each type your office uses and see where it lands before you make it the standard route for all of them.

6. Set the Status and Create the Transaction

Pipeline fills fields and stops there. It never picks a status and it never saves on its own, because every office runs statuses its own way — so a listing you're putting live and one you're holding are your call, not the software's.

Set the status, click [Create], and you land in the new transaction ready to work it. The document you uploaded is filed on the transaction on the way in, named to your office's standardized document names.