Pipeline AI Create

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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.

Introduction

Opening a new file means reading the contract and typing what it says into the transaction form. The address, the dates, the price, the people. It's the least interesting half hour in the job, and it's where the errors come from, because a number read once and typed once has nothing to be checked against.

AI Create turns that around. You hand Pipeline the signed contract, listing agreement, or intake form, and the transaction form comes back already filled in, with every value it pulled tied to the spot in the document it came from. That link is the whole design. You aren't being asked to trust a filled form, you're being asked to check one, and checking a value against the sentence that produced it takes seconds rather than a second read of the contract.

The half hour goes instead to the parts that need a person: the exception in the terms, the client on the phone, the judgment about which status this really is. Nothing is committed while you're looking. The draft sits in front of you until you confirm it, and entering a transaction by hand hasn't gone anywhere.

How It Works

You give Pipeline a PDF. It reads the document, fills the *Add Transaction* form, and shows its work — so reviewing takes seconds instead of a second pass through the contract.

Start It From a Document

Two ways in. Click [⍰ Add Transaction] from the upper-right corner of any page and choose [Create from Document] to upload a PDF from your computer. Or start from a doc that's already in *Unassigned*: hover its folder icon in the folder column and click when it turns blue.

Pipeline Reads in the Background

The read runs on its own — usually about a minute — so you can keep working. Pipeline tells you when your filled form is ready, and the document shows a green folder with a checkmark so you can spot it at a glance.

Every Value Traces Back to the Document

Your result opens as a two-pane review: the filled form on one side, your document on the other. Each pulled value carries a document icon — click it and the PDF jumps to the source text. The arrows at the top step you through the filled fields in order.

Pipeline Handles Dates, Doc Names, and Filing

When a contract states a deadline as a rule rather than a date — "inspection 10 days from acceptance" — Pipeline works out the real calendar date and accounts for your company's business holidays. On save, Pipeline files the source document on the new transaction and names it from your Standardized Document Names.

You Set the Status, and You Save

Pipeline fills fields. It never sets the status and never saves on its own, because every office runs statuses its own way. Confirm the values, set the status, then create the transaction. Manual entry doesn't go anywhere either — [Create Manually] is still on the same menu.

What AI Create Pulls From a Document

- **Transaction information**: the transaction name or property address, MLS or Transaction Number, label, and the listing, expiration, acceptance, and expected close dates.
- **Contingency dates**: deadlines the contract states as day-rules, each calculated to a real calendar date with your business holidays counted.
- **Buyers and sellers**: the parties named on the contract, matched to your existing contacts or added new.
- **Financials**: list price, sale price, total commission, earnest money, and financing type.
- **More Info, Admin Info, and Commission Summary**: your office's default content, filled from the document, plus a short written summary of the notable details.
- **Other property details**: year built, lockbox code, and home warranty details.
- **Outside contacts**: the outside (co-op) agent, lender, attorney, and title officer — matched to your contacts where Pipeline can, added new where it can't.
- **Assigned agents**: your office's own agents named in the document, each assigned to the side of the transaction they're on.

Create a Transaction From a Document on Your Computer

> Starts an *AI Create* from a PDF you upload.

> **Who Can Do This**: Anyone, once a master admin has enabled Pipeline AI for the account — subject to your own permissions and transaction access. Until it's enabled, the option doesn't appear.

To create a transaction from a document on your computer:

1. Click [⍰ Add Transaction] from the upper-right corner of any page.
2. Choose [Create from Document].
3. Pick the PDF from your computer, then click [Create Transaction].
4. Leave it to read. The run happens in the background, usually about a minute — keep working, and Pipeline lets you know when your filled form is ready.

When it's ready, open and review it — see *Review and Save Your AI Create Result* below.

Create a Transaction From an Unassigned Doc

> Starts an *AI Create* from a PDF already sitting in *Unassigned*.

> **Who Can Do This**: Anyone, once a master admin has enabled Pipeline AI for the account — subject to your own permissions and transaction access.

To create a transaction from an unassigned doc:

1. Click [Unassigned] in the top menu, then find the document you want to start from.
2. Hover over the document's folder icon in the folder column to the right of the doc name.
3. Click the icon when it turns blue.
4. Leave it to read. Pipeline lets you know when your filled form is ready, usually about a minute.

The icon only appears on hover, so it's easy to miss the first time — hover the folder column, not the doc name.

Review and Save Your AI Create Result

> Takes you from the "your result is ready" notice to a saved transaction.

> **Who Can Do This**: Anyone who can run an *AI Create*. The notice goes to the person who started the run.

To review and save your AI Create result:

1. Open it from the notification, or go to [Unassigned] and find the document showing a green folder with a checkmark. Click the green folder to open the filled-in *Add Transaction* form.
2. Check the filled fields against the document. Click any field's document icon to highlight its source in the PDF, or use the arrows at the top to step through the fields in order.
3. Correct anything that's off, and fill any blank by hand.

4. Set the transaction status.

5. Click [Add Transaction].

You land on the new transaction with the source document filed in its doc list. Until you complete this step, nothing has been created — the result waits for you in *Unassigned*.

Decide What Status the New File Opens In

Setting the status is the one step Pipeline won't guess at, and that's deliberate — a signed contract means *Pending* in one office and *Under Contract* in the next. The list you're choosing from is your own to shape.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

Pipeline AI Create FAQ

AI Create reads your contract and fills the transaction in for you. Answers to the common questions about what it pulls, which documents it handles, and how it sits alongside manual entry.

See AI Create FAQ

Pipeline AI Create Troubleshooting

Result not looking how you expected? Start here.

- Why Did Pipeline AI Fill a Field Wrong or Leave It Blank?
- Why Is the Wrong Contact on My AI-Created Transaction?
- Why Isn't My AI-Created Transaction in My Account?