Pipeline AI Create FAQ

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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.

What does AI Create pull from my document?

The transaction's core details, its money, its dates, and its people. The transaction name or property address, MLS or Transaction Number, label, and the listing, expiration, acceptance, and close dates; list price, sale price, earnest money, total commission, and financing type; buyers, sellers, your own agents, and the outside agent, lender, attorney, and title officer. It also fills your office's More Info, Admin Info, and Commission Summary content and writes a short summary of the notable details.

Do I have to train it or map fields first?

No — there's nothing to set up. Different forms, different states, different brokerages all run on the same engine, and Pipeline reads a document the first time it sees it.

What kinds of documents can I start from?

Purchase contracts, listing agreements, and intake forms are the everyday ones. Scanned or digital, hand-signed or e-signed — send it as you have it. Results vary with how plainly a document states its terms, which is why you review the filled form before you save.

Can I upload one PDF that bundles several forms?

Yes. Pipeline reads the whole file and pulls transaction details from whichever pages carry them, so a contract with its riders and disclosures is one run. If the forms arrived as separate files, start the transaction from the main contract and bring the rest in with *AI Update*.

Can I still add a transaction manually?

Yes, and nothing about it changed. Click [� Add Transaction] from the upper-right corner and choose [Create Manually] — the same form as always. Turning Pipeline AI on adds a path; it doesn't take one away.

Does AI Create set the transaction's status?

No — you do. Pipeline fills the fields and stops there, because every office runs statuses its own way. Set the status yourself when the transaction reads right, then save.

Does correcting a value cost anything?

No. Editing on the review screen is part of the run you already started — fixing a value, filling a blank, or moving something into the right field doesn't start a new one. Treat the filled form as a strong first draft and verify it before you save.

Why don't I see the option to create from a document?

Pipeline AI has to be turned on for the account first, and only a master admin can do that. Until it's enabled, [Create from Document] doesn't appear and the folder icon on a doc does nothing — including for offices that tried an early demo, which was replaced by the full version when Pipeline AI launched. Ask your master admin to switch it on.

Troubleshooting

Running into something? These walk through the common snags.

- 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?

Learn More

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

Still Have Questions?

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