

AI Create

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Check the form AI Create fills in from a contract, then save it as a new transaction.

Introduction

Pipeline AI helps you create a transaction from the paperwork that starts it. Opening a new file means reading the contract and typing what it says into the form: the address, the dates, the price, the people. Pipeline reads the signed contract, listing agreement or intake form, with any addendum that goes with it, and does that typing for you. Each create draws on your plan's monthly credit.

When you open the result, each value sits beside the text it came from, so you can check the form against the contract in one place. You fix anything that's off, choose the status, and add the transaction.

Nothing is created on its own. Someone on your team checks the form and adds the transaction when it's right.

How It Works

Pipeline Fills the Form, You Check and Add It

AI Create helps you create. It does the typing, and you make the call.

- **Pipeline** reads the contract and any docs you add with it, fills in the transaction form, and shows where each value came from.
- **You** check the form against the contract, fix anything that's off, choose the status, and add the transaction.

Give It One Doc or Multiple Docs

Hand Pipeline the contract by itself or select it along with an addendum or a disclosure. Pipeline reads them together and fills one *Add Transaction* form, and each doc lands on the new transaction separately. One create reads up to 50 pages and 40 MB across everything you select.

Every Value Traces Back to the Document

Your result opens as a two-pane review, the filled form on one side and your document on the other. Fields Pipeline filled are marked in blue, and each blue field's document icon takes you to the text its value came from. The arrows at the top step through the filled fields in order.

Pipeline Handles Dates and Filing

When a contract states a deadline as a rule, like "inspection 10 days from acceptance", Pipeline works out the calendar date and counts your company's business holidays. The dates it fills in, including your custom date fields, set the due dates of any tasks tied to them. When you save, Pipeline files each source doc on the new transaction.

What AI Create Fills In

The review is laid out like the form for adding a transaction by hand. Here's what Pipeline fills in from the document, section by section.

- **Transaction Information:** the transaction name or property address, MLS or transaction number, label, and the listing, automatic expiration, acceptance and close dates the document gives.
- **More info, Admin info and Commission summary:** a short, written summary of the notable details. When your office has a default template for one of these, Pipeline fills in the template instead.
- **Buyer, Seller, Pricing, etc.:** the buyers' and sellers' names, list price, sale price and total commission.
- **Contacts:** the people and companies the document names, such as the sellers, the broker, the lender and the home warranty company. Each is added as a new contact for you to check.
- **Assign Agents:** your office's own agents named in the document, each on the side they're on.
- **Outside (co-op) agents:** an agent the document names who isn't in your office.
- **Custom fields:** filled when a field's name closely matches how the document labels the value. That includes your custom date fields, and deadlines the contract states as day-rules, like "inspection 10 days from acceptance".

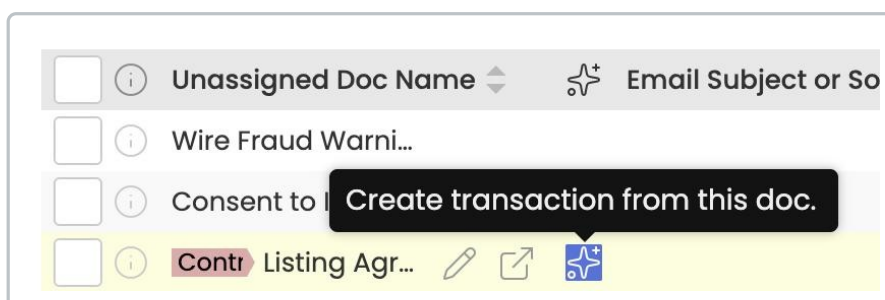
Create a Transaction From One Doc in Unassigned

Start from a contract that's already in *Unassigned*.

Who Can Do This: Admins / Staff. When Create is set to Anyone, also anyone who can add a transaction without Pipeline AI.

To create a transaction from one doc in Unassigned:

- 1 Click **[Unassigned]** in the top menu.
- 2 Hover over the contract's row, and click the sparkle icon that appears.
- 3 Click **[Create transaction]**.



A spinner shows on the doc while Pipeline reads, usually from a few seconds to about a minute. A green flag replaces it when the form is ready to review.

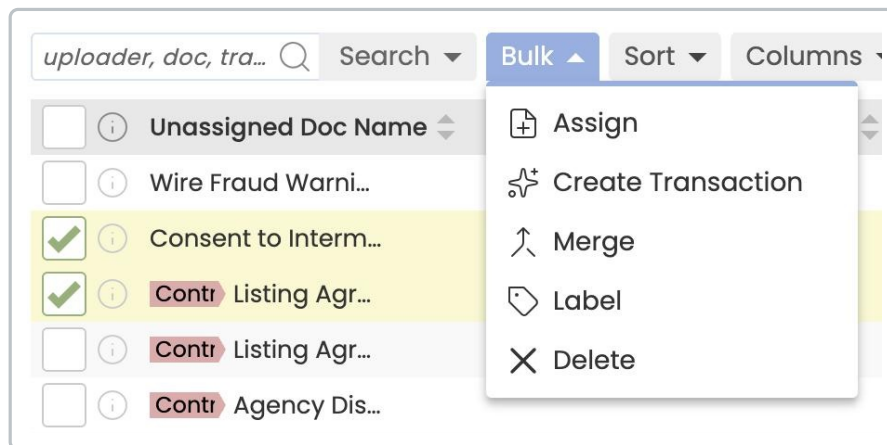
Create a Transaction From Several Docs in Unassigned

Start from a contract and the docs that go with it and get one form for the deal.

Who Can Do This: Admins / Staff. When Create is set to Anyone, also anyone who can add a transaction without Pipeline AI.

To create a transaction from several docs in Unassigned:

- 1 Click **[Unassigned]** in the top menu.
- 2 Check the boxes next to the docs that belong to the deal.
- 3 Click **[Bulk]**, then **[Create Transaction]**.



The docs show as one row while Pipeline reads them, up to 50 pages and 40 MB in all. Stay on *Unassigned*, and the review opens on its own when the read finishes.

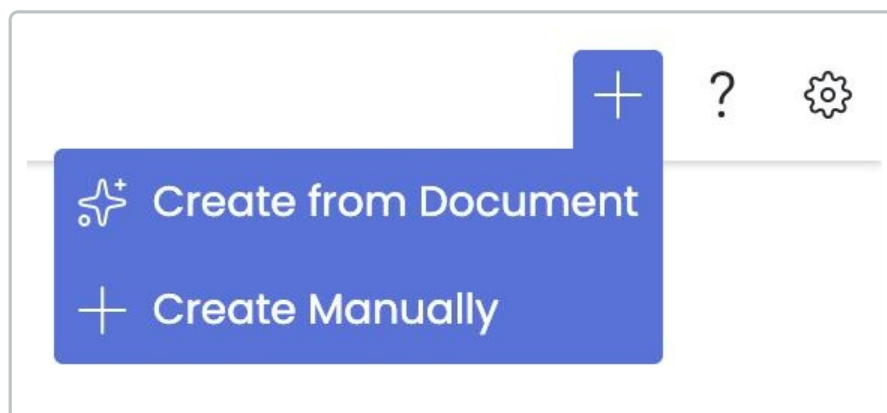
Create a Transaction From Docs on Your Computer

Upload a contract from your computer.

Who Can Do This: Admins / Staff. When Create is set to Anyone, also anyone who can add a transaction without Pipeline AI. Either way, you also need the Upload Docs permission in at least one location.

To create a transaction from docs on your computer:

- 1 Click the **[+]** in the upper-right corner of any page, then **[Create from Document]**.
- 2 Drag the PDF or PDFs onto the page, or click to choose them from your computer.
- 3 Click **[Create Transaction]**.



A green flag on the doc in *Unassigned* shows when the form is ready to review.

Review the Form and Add the Transaction

Check what Pipeline filled in against the contract, fix what's off, and add the transaction.

Who Can Do This: Anyone who can use AI Create.

To review the form and add the transaction:

- 1 Click the green flag on the doc in *Unassigned*.

You can also click **[click here to review]** in the message at the top of *Unassigned*. After a Bulk create, the review may already be open.
- 2 Check each blue field against the contract on the right.

Click a field's document icon to see where its value came from, or use the up and down arrows at the top to step through the filled fields.
- 3 Correct anything that's off, and fill any blanks by hand.

Look hardest at the dates. A wrong date carries into every deadline counted from it.
- 4 Check the contacts, and remove any you don't want with **[Remove from contacts]**.
- 5 Under *Add this doc to the transaction as*, check the name the doc will be filed under.
- 6 Choose a status. Pipeline never picks one for you.
- 7 Click **[Add Transaction]**.

Create Transaction from Doc

Transaction for Listing Agreement

Blue fields were autofilled — click the  to verify in the doc.

Form Name: Exclusive Right to Sell Listing Agreement (Sample Form Rev. 09/2026)

Summary: Exclusive right to sell listing agreement for a townhouse at 905 Pecan Grove Lane, Anytown, TX, listed at \$342,000 by sellers Luis and Elena Moreno with Sample Brokerage. The term is 365 days starting 6/16/2026 with a 90-day protection period, and total commission of 5.5% (3.0% listing, 2.5% buyer side).

Add this doc to the transaction as:

Listing Doc

Transaction Information

Transaction name or property address * 

905 Pecan Grove Lane, Anytown, TX 00000

MLS or transaction number

Status *

- Select Status -

Label 

Town House

Listing date  Automatic expiration date 

06/16/2026 06/16/2027

Listing Agreement

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EXCLUSIVE RIGHT TO SELL LISTING AGREEMENT
Residential Real Property - This document is fictitious and prepared solely for demonstration.

1. PARTIES

SELLER 1 — FULL LEGAL NAME	SELLER 2 — FULL LEGAL NAME
Luis A. Moreno	Elena R. Moreno
SELLER 1 PHONE	SELLER 1 EMAIL
(555) 555-0103	lmoreno@example.com
SELLER 2 PHONE	SELLER 2 EMAIL
(555) 555-0104	emoreno@example.com
LISTING AGENT	AGENT LICENSE #
Sarah Jane Smith	ST-1058830
AGENT PHONE	
(555) 555-0146	

2. THE PROPERTY

STREET ADDRESS	UNIT / APT
905 Pecan Grove Lane	
CITY	STATE
Anytown	TX
ZIP	COUNTY
00000	Example
PARCEL / A/PN	114-517-0905
PROPERTY TYPE	BEDS
Townhouse	3
BATHS	2.5
LIVING AREA (SQ FT)	1,640
LOT SIZE	0.06
YEAR BUILT	2016

3. TERM OF LISTING

Seller grants Broker the exclusive right to sell the Property beginning on the Listing Date stated below. This listing shall remain in force for a period of three hundred sixty-five (365) days from the Listing Date, and shall expire at 11:59 PM on the final day of that period unless extended in writing. The Protection Period shall run for ninety (90) days following expiration.

LISTING DATE (START OF TERM)	TERM LENGTH (DAYS)	PROTECTION PERIOD (DAYS AFTER EXPIRATION)
06/16/2026	365	90

4. LIST PRICE AND TERMS

LIST PRICE	SELLER CONCESSIONS OFFERED	POSSESSION
\$342,000	Up to 2% toward buyer closing costs	At closing
HOME WARRANTY FOR BUYER	WARRANTY COMPANY	PLAN
Yes, Seller pays	Sample Home Warranty Company	Plus plan
SELLER COST UP TO		\$625

5. BROKER COMPENSATION

TOTAL COMMISSION (%)	LISTING SIDE (%)	BUYER SIDE OFFERED (%)	FLAT FEE (IF ANY)
5.5%	3.0%	2.5%	\$395 admin

You land on the new transaction with the doc filed on it, and the deal's other docs in *Unassigned* turn blue. Until you click **[Add Transaction]**, nothing is created: the doc waits in *Unassigned* with its green flag, and its Assign button stays off.

Assign the Deal's Other Docs

Once the transaction exists, the deal's other docs in *Unassigned* turn blue, with the new transaction already picked.

Open Unassigned to docs AI Assign has already named, each one ready for you to assign.

See [AI Assign](#)

Bring the Deal Up to Date

When new paperwork comes in later, Pipeline reads it against the transaction and fills in what changed.

Review the changes AI Update pulled from a counter-offer or addendum, and apply the ones you want.

See [AI Update](#)

Choose Who Can Use AI Create

Who can use AI Create is its own setting, the Create row on the Pipeline AI page.

Choose who can use Pipeline AI, and limit what it costs once your monthly credit is used.

See [AI Settings](#)

Frequently Asked Questions

Does AI Create run on its own?

No. AI Create helps you create a transaction. It runs only when someone starts it, and nothing is created until they check the form and click [Add Transaction]. Reading each doc as it lands in *Unassigned* is AI Assign's job, and it's included in your plan.

What kinds of documents can I start from?

Purchase contracts, listing agreements and intake forms. Scanned or digital, hand-signed or e-signed, send it as you have it.

Can I create a transaction from more than one doc?

Yes. Select the contract along with an addendum or a disclosure, and Pipeline reads them together.

What counts as one AI run?

One create or one update. A create from multiple docs is still one run, up to 50 pages and 40 MB across the docs you select.

Can I upload one PDF that bundles several forms?

Yes. Pipeline reads the whole file, up to 50 pages, and pulls details from whichever pages carry them.

Do I have to train it or map fields first?

No. Different forms, states and brokerages all run the same way, and Pipeline reads a document the first time it sees it.

Does AI Create set up my checklist or task due dates?

Not the checklist itself. Checklists apply the same way they would for a transaction you add by hand. The dates AI Create fills in, including your custom date fields, set the due dates of any tasks tied to them.

Does AI Create use our Pipeline AI credit?

Yes. Every create uses the month's credit first. Past the credit, creates run only up to your monthly spending limit.

Does AI Create work during a free trial?

On a small credit. A free trial includes a small credit to try AI Create and AI Update.
