

Pipeline AI

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Let Pipeline AI do the reading from listing to close, and check its work instead of typing it.

Introduction

Every deal brings paperwork: the docs that land in *Unassigned*, a packet that holds several documents, the contract that starts the file, the counter-offer that changes it. Pipeline AI helps at each step. It names each doc and looks for its deal, finds the documents inside a packet, fills in a new transaction from the contract, and finds what a later document changed. None of it finishes the job on its own. Your team looks over each step and makes the call.

Before anyone starts, you choose who can use each step and what it can cost. After that, Pipeline AI works the way paperwork arrives: docs in *Unassigned* first, then packets, then the contract, then whatever comes after it.

How It Works

When Each One Runs

AI Assign and AI Break Apart read each doc as it lands in *Unassigned*, whether it's uploaded or emailed in. AI Create and AI Update run only when someone starts one: from a doc in *Unassigned*, from docs on their computer, or from a new doc on a transaction.

Every Result Waits for Your Check

In *Unassigned*, each doc waits under a name, and its Assign button turns blue when Pipeline has picked its transaction. A packet opens in Break Apart with its cuts already in place. In AI Create and AI Update, Pipeline marks the fields it filled in blue, and each one's document icon shows the text it came from. Nothing is assigned, split or saved until someone on your team does it.

What Comes With Your Plan

AI Assign and AI Break Apart are included in your paid plan and don't use your credit. AI Create and AI Update run on a monthly credit that grows with your transaction plan. Once it's used, AI Create is \$1.00 and AI Update is \$0.50, up to the monthly spending limit you set. The limit starts at \$0, so nothing is added to your bill until you raise it.

Who Can Use It

A master admin chooses who can use AI Create and who can use AI Update. Both start at Admins / Staff: master admins, and admins with the View All Transactions permission. AI Assign and AI Break Apart share one setting for the whole office.

Benefits

Docs You Can Read Without Opening Them

Each doc in *Unassigned* waits under a clear name, with the deal it's for beside it when Pipeline finds one, so assigning comes down to a quick check.

Packets You Don't Have to Page Through

You can see what's inside a packet before you open it, and the cuts and names are in place when you break it apart.

Transactions Without the Typing

Pipeline fills in the form from the contract, so starting a file means checking the form against the contract instead of typing it.

Changes Found for You

On a long counteroffer or addendum, Pipeline finds what moved, and only the changes you keep go on the transaction.

No Forms to Teach It

Different forms, states and brokerages all run the same way, with nothing to train or map.

Spending You Control

Your team uses the credit first, and charges past it never go over the limit you set.

1. Decide Who Can Use It and What It Can Cost

Reading the docs that come in is included in your plan, and filling in and updating transactions runs on a monthly credit your admins and staff can use from day one.

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

See [AI Settings](#)

2. Assign Docs Without Opening Each One

Docs that come into Pipeline without a transaction wait in *Unassigned* until someone adds them to one. When each doc comes in, Pipeline reads it, works out what it is, and looks for the deal it belongs to.

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

See [AI Assign](#)

3. Break Apart a Packet Without Counting Pages

Sometimes one PDF holds several documents, like a listing packet signed in one sitting. Pipeline finds where each one starts and ends while it waits in *Unassigned*.

Break apart an unassigned packet into separate docs, along the cuts AI Break Apart found.

See [AI Break Apart](#)

4. Start a Transaction From the Contract

Starting a transaction means typing what the contract says: the address, the price, the dates, the people. Pipeline reads the contract and does that typing for you.

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

See [AI Create](#)

5. Bring a Deal Up to Date From a New Document

Once a deal is open, new paperwork keeps changing it, like a lower price or a later closing date. Pipeline compares each new document to the transaction and finds what's different.

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

See [AI Update](#)
