Turning On Pipeline AI

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Admin Version View Agent Version ↗

Let Pipeline AI do the reading, and review what it gets ready for you.

Introduction

Pipeline AI is the AI built into Pipeline. It reads your real estate documents so you and your team don't have to. It sorts the docs that come in, and it types a contract's details into a transaction for you. You spend your time reviewing instead of typing, and nothing changes in Pipeline until someone on your team reviews it and saves.

By the time you open *Unassigned*, the docs that came in are already sorted. AI Assign gives each one a clear name, from your Standardized Document Names when one fits, in place of the number a scanner gave it. It also pre-assigns each doc to the transaction whose name or property address matches, so all you do is review it and assign it. AI Break Apart handles a PDF that holds several documents, like a listing packet signed in one sitting. It marks where each document starts and ends and names each one, so when you break the packet apart, the documents are already marked and named, ready for you to review. Both work on their own, on every doc that comes into *Unassigned*.

When a deal starts, AI Create reads the signed contract, with any counteroffers and addenda, and fills in a new transaction, dates and deadlines included. As the deal changes, AI Update reads a counteroffer or addendum and fills in what changed, like a lower price or a later closing date. Every detail Pipeline fills in shows where it came from in the document, so reviewing it is quick.

AI Assign and AI Break Apart are included with your plan. AI Create and AI Update use a monthly AI credit sized to your transaction plan. When the credit runs out, they pause until next month, unless a master admin sets a monthly limit. Your bill only goes up if you choose.

AI Assign and AI Break Apart are on from the start, and admins and staff can use AI Create and AI Update. As a master admin, you decide who uses each one and what it can cost.

Pipeline gets each step ready, and someone on your team finishes it.

Pipeline AI Settings

Pipeline AI works for your admins with nothing to set up. Go to its settings when you want more of your team using it, room to keep going past your monthly credit, or a part of it turned off.

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

See Pipeline AI Settings

AI Assign

AI Assign renames and pre-assigns docs as they're added to *Unassigned*. It works on its own on every doc, and looks for the transaction whose name or property address matches. It's included with your plan.

Review the name and transaction AI Assign picked for each new doc in *Unassigned*, then assign it.

See AI Assign

AI Break Apart

AI Break Apart detects doc packets in *Unassigned* and marks where to break them apart. A packet is one PDF that holds several documents, like a listing packet signed in one sitting. AI Break Apart works on its own and names each document it finds. It's included with your plan.

Review the documents AI Break Apart found inside a packet in *Unassigned*, then break it apart.

See AI Break Apart

AI Create

AI Create creates an autofilled *Add Transaction* form from a contract. It runs when someone picks a signed contract, with any counteroffers and addenda, and shows where each detail came from. Each one is $1.00 after your monthly credit.

Review the *Add Transaction* form AI Create fills in from a contract, then add the transaction.

See AI Create

AI Update

AI Update updates the *Edit Transaction* form using a counteroffer or addendum. It runs when someone picks one on an open transaction, and fills in what changed, like a lower price or a later closing date. Each one is $0.50 after your monthly credit.

Review the changes AI Update pulled from a counteroffer or addendum, then save the ones you want.

See AI Update