Using Pipeline AI

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Agent Version View Admin Version ↗

Send in your deal documents, and review what Pipeline AI gets ready from them.

Introduction

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

By the time you open *Unassigned*, the docs you uploaded or emailed in are already sorted. AI Assign gives each one a clear name, from your office's 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 your seller 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 your deal starts, AI Create reads your 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 on your transaction, 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.

Your office decides who can use AI Create and AI Update. If you don't see them, ask your admin.

Pipeline gets each step ready, and you finish it.

AI Assign

AI Assign works on its own on every doc you upload or email into *Unassigned*. It renames each one and pre-assigns it to the transaction whose name or property address matches.

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 works on its own on any PDF you send into *Unassigned* that holds several documents, like a listing packet your seller signed in one sitting. It marks where each document starts and ends, and names each one.

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

See AI Break Apart

AI Create

AI Create runs when you pick your signed contract, with any counteroffers and addenda. It autofills the*Add Transaction* form and shows where each detail came from.

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

See AI Create

AI Update

AI Update runs when you pick a counteroffer or addendum on your transaction. It updates the*Edit Transaction* form with what changed, like a lower price or a later closing date.

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

See AI Update