

Pipeline AI (for Agents)

Last Modified on 10/22/2026 1:26 pm EDT

Agent Version [View Admin Version ↗](#)

Get your documents in and your deals filled in, with Pipeline AI doing the reading and you checking what it found.

Introduction

Every deal you work brings paperwork, and Pipeline AI helps at each step. A doc you upload or email lands in *Unassigned* with a name you can read, and its transaction picked when Pipeline finds it. A signed contract can start a new transaction, ready for you to look over before you add it. A counter-offer on an open deal shows you what changed. Nothing is saved until you save it.

Naming docs and breaking packets apart work for anyone who can upload docs. Starting or updating a transaction with Pipeline AI is up to your office: a master admin chooses who can use each. If you don't see those options, ask your admin.

How It Works

When Each One Runs

AI Assign and AI Break Apart read each doc you upload or email in, as it lands in *Unassigned*. AI Create and AI Update run only when you start one: from a contract in *Unassigned* or on your computer, or from a new doc on one of your transactions.

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 you uploaded 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 you do it.

What Your Office Decides

When your office opens AI Create or AI Update to everyone, you can use it on the transactions you can already add or edit. Both run on your office's monthly credit, so they can pause until your admin raises the limit or the next billing period starts.

Benefits

Docs You Can Read Without Opening Them

Each doc you send in 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 you uploaded 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 your 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 your transaction.

Paperwork as You Have It

Scanned or digital, hand-signed or e-signed, Pipeline reads the contract the way it came to you.

1. Assign Your Docs Without Opening Each One

Docs you upload or email in without a transaction wait in *Unassigned* until you put them on one. Pipeline reads each one as it arrives, 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](#)

2. Break Apart a Packet Without Counting Pages

Sometimes one PDF holds several documents, like a listing packet your seller signed in one sitting. When you upload one, Pipeline finds where each document 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](#)

3. Start a Transaction From Your Contract

Once your contract is signed, someone has to type it into a new transaction: 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](#)

4. Update a Deal When the Terms Change

Your deals keep changing after they open, like a lower price or a later closing date, and each change arrives as another document. Pipeline reads each new one against your 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](#)

