Manage a Buyer's Offers When You Only Have the Buyer Side

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Your agent brought the buyer, the offers keep going out, and most come back rejected. There are two places in Pipeline to keep them, and the choice comes down to how many transactions you want to spend.

Introduction

On the listing side a rejected offer has an obvious home: the listing it was made on. On the buyer side there is no listing in your account. The buyer signed with you, the offer went to someone else's property, and the signed pages still have to be somewhere your broker can produce. Every document in Pipeline lives on a transaction, so the question is never whether to spend one. It is how many.

Two patterns work, and support has recommended both for years. Give each active buyer a transaction of their own, named for the buyer. It holds the agreement, the pre-approval, and every offer until one is accepted, and then it becomes the real deal. Or keep one holding transaction for rejected offers, for the office or for each agent. The dead offers go there, and the accepted one gets its own transaction the day it goes under contract.

Either pattern gets easier with a few habits around it. A status you already have, chosen on purpose. An agent assignment so agents file their own offers. Doc names that sort one buyer's offers together, and a search that finds them from any page.

When to Use This

- Your agents represent buyers, and the signed agreements and offers have no property to be filed under yet.
- A buyer's offer was rejected and there is no listing transaction in your account to put it on.
- Your transaction count is climbing because of buyers who never went under contract.
- You have been asked which is better, a file per buyer or one shared file for rejected offers, and nobody has said why.
- Months later you need one buyer's offers, or every transaction holding a document with a certain name.

Why the Listing-Side Answer Doesn't Apply

Offices that also list property already know the answer for the listing side: leave the offers on the listing, put a label on them, and never spend a transaction. Keep Rejected and Backup Offers on File covers that, and it is the right move whenever the property is yours.

It fails on the buyer side for one reason. There is no listing transaction. The offers your buyer made were on other brokers' listings, and Pipeline has nowhere to put a document except on a transaction, so one has to exist. So the job is to spend as few as possible and still find the paperwork a year from now.

1. Pick a File per Buyer or One Rejected Offers File

This is the whole decision, and everything else follows from it. Choosing between a file per buyer and a holding file

is the same choice an office makes for buyer agreements, and Store Buyer Broker Agreements Before You Have an Address weighs the two.

What offers add is the Rejected Offers file. It is one transaction for the office, or one per agent, that collects the offers that were turned down. Nobody spends a transaction on a buyer until the day that buyer goes under contract, and that is when the real transaction gets created. The cost is a file that grows for years and a buyer's offers sitting next to everyone else's.

2. Use a Status You Already Have

Don't create a status for these files. A holding transaction still exists and still counts, so a custom status adds a name to the dropdown without keeping the file out of your numbers. Keep Rejected and Backup Offers on File explains why, and the statuses you already have do the job.

A per-buyer file sits in one of your existing active statuses while the buyer is looking. When an offer is accepted, rename the file to the property address and move it to Pending. If that deal later collapses, move it to a Fell Through status and use New Offer. It carries the buyer's fields, contacts, and docs into a fresh linked file for the next attempt. Deal Falls Through, New Offer on the Same Listing walks that path, and it handles a buying-side-only transaction the same way.

A Rejected Offers file goes in a Fell Through status from the day you create it. That keeps it off everyone's active list and out of your production numbers, it still goes into your monthly backup, and people reach it through search.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

3. Make One Rejected Offers File per Location or per Agent

One holding file for the whole office works when a few admins do all the filing. When each office files its own, create one per location and put it in that location, so the admins there see it on their list and the admins elsewhere don't.

The shape that takes the work off your desk is one per agent. Name it for the agent, Rejected Offers - Smith, and assign that agent to it on the buying side so they can open it, as Store Buyer Broker Agreements Before You Have an Address explains. Once assigned, they upload their own rejected offers straight into their file instead of sending each one to you. Keep the naming the same across all of them, so one search on the word Rejected returns every holding file at once.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

4. Name Each Offer for the Buyer, Then Sort by Document Name

Name every offer buyer first, then the property: Harper Lee - 1420 Wilshire. In a holding file, a sort by Document Name lines up one buyer's offers in a row. In a per-buyer file, the same sort puts the offers in address order.

The sort is yours alone, and Pipeline carries it to the next transaction you open, so set it once. If you also want the

offers to read as rejected at a glance, a Rejected Offer doc label does that, the same way it does on the listing side.

Every doc on a transaction lives in one list. Sort it the way you work, and Pipeline remembers your choice on every transaction after that.

See Transaction Docs List

5. Find One Buyer's Offers From Any Page

Click into Power Search in the upper-left corner, choose the doc field, and type the buyer's name. Pipeline returns every transaction holding a document with that name, of any status, which is how a holding file sitting in Fell Through comes straight back. Choose the name field and type Rejected instead, and every holding file in the account comes up together. Matching is on the exact characters you type, so one distinctive word beats the full name with a middle initial.

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Power Search