Transaction View

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One deal, all of it on one page: its details at the top, the people on it, its documents, its checklists, and its notes, with a left menu for the things you do to the whole file.

Introduction

Open a transaction and the page is the file. The Info sections at the top hold the dates and prices, then the agents, the checklists and tasks, the contacts, the docs, and the notes and sent emails, each showing what your role gives you access to.

Reading is the page; changing is a deliberate move. The details you read are not the details you type into, which is why Edit Transaction is a link in the left menu rather than a click into a field.

The Info Sections at the Top

Read and Update the Deal

Dates, prices, status, agents. Edit Transaction in the left menu is where any of them changes, and a field your office has locked shows but does not take an edit.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

The Dates the Deal Runs On

Listing, expiration, acceptance and close. Reports, reminders and task deadlines read them, so moving one here moves everything counting from it.

Enter a deal's listing, expiration, acceptance and close dates, and Pipeline counts deadlines and builds reports from them.

See Transaction Dates

The Name at the Top

How everyone recognizes the deal in a list, set to your office's convention. Buying agents can be allowed to rename their own.

A transaction's name is how you'll recognize it at a glance — set it to match your office's convention.

See Transaction Names

The Numbers That Tell It Apart

The MLS or transaction number is what search finds when two deals share an address.

Every transaction carries identifying numbers that tell it apart from every other one in your account.

See Transaction ID

Which Side You Are On

Pipeline reads the side from the agents assigned. There is no field to set, and the letter beside the name on your list is the tell.

Pipeline figures out whether you're on the listing side, the buying side, or both — automatically.

See Transaction Sides

Notes and Sent Emails

Leave a Record on the Deal

A note stays on the transaction beside the emails sent from it, so what was said about the deal lives with the deal.

Leave a note on a transaction to document a detail or keep the team on the same page.

See Transaction Notes

The Left Menu

A Second Offer on the Same Listing

New Offer opens a separate, linked transaction carrying the listing paperwork over. Use it for second and later offers, never the first.

Restart a deal or take the next offer as a new transaction, linked to the one before it.

See New Offers

Start a New Deal From This One

Reuse this transaction as the starting point for the next one that looks like it, choosing what copies over.

Reuse an existing transaction as the starting point for a new one.

See Transaction Duplication

Everything That Happened to It

Every change on the transaction is recorded. Search the history by action, person, or date when someone asks who did what.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

Agents

Who Is on the Deal

Each in-house agent sits on the listing side or the buying side. That is what opens the file to them and credits the deal to them.

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

Someone Helping Without Credit

Tag a user as an assistant and they can work the file without taking sales credit or commission.

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants

The Other Brokerage's Agent

Recorded for reference only, with no access to your transaction.

Record the agent from the other brokerage for reference, without giving them any access to your transaction.

See Outside (Co-op) Agents

Docs

The List of Documents

Every doc on the deal, grouped under its permission category, sorted the way you work. Pipeline remembers your sort on every transaction after that.

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

Email Docs and Notes In

Your own address for this deal sits under its name. Messages sent there stay on the file, and their docs wait in Unassigned, already pointed at it.

Send or forward a message to the transaction it belongs to. Pipeline keeps the message on the file and sends its docs to Unassigned, already pointed at that transaction.

See Your Transaction Maildrop Address

Read One Without Downloading

Click a doc's name and it opens on the page. Arrow keys move through it and a typed page number jumps.

Click a doc's name and it opens right there on the page — read it, page through it, and keep working without downloading a thing.

See Doc Preview

Turn One the Right Way Up

Two clicks rotate a doc and the corrected version is saved for everyone.

Uploaded sideways or upside down? Two clicks turn a doc the right way up, and it stays that way for everyone.

See Doc Rotation

Combine Several Into One

Merge PDFs into one document named the way your office names things, right here on the deal.

Combine several PDFs into one clean document, named the way your office names things, whether they're already on a transaction or still waiting in *Unassigned*.

See Doc Merge

Split a Scanned Stack

One scan holding several documents becomes separate named docs, or the pages you need for a send.

One scanned stack, many documents. Break a doc apart to split it into separate docs, pull out the pages you need, and name each one as you go.

See Doc Break Apart

Say Something on a Doc

A comment travels with the document, reaches the agent, and stays in the history.

Leave a note right on a doc and it travels with the document — your team sees it, the agent hears about it, and *Transaction History* keeps the record.

See Doc Comments

Checklists and Tasks

Add a Checklist by Hand

For the deal that matched no rule. The plus at the top of the Checklists area is where you pick the template.

Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.

See Applying a Checklist

The Checklists Area Itself

Where a transaction's checklists live: expand them, reorder them, and set how they display.

The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.

See Checklists Panel

Keep One at the Top

Pin the checklist that matters most and it stays first as new ones are added.

Keep the checklist that matters most at the top of a transaction, even as new ones are added.

See Pinned Checklist

How Far Along the Deal Is

A percentage or a ratio of completed tasks, spanning every checklist on the transaction.

See how far along a transaction is at a glance — shown as a percentage or a ratio of completed tasks.

See Completion Percentage

Taking the File Out

Download This One Transaction

One closed transaction on its own, without waiting for the monthly backup, within a daily limit.

Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

See Individual Transaction Downloads

Who Can See What

Who Can Open the Transaction

Being on the transaction, or having view-all for its location. Those are the two routes, and a file you are not on does not appear at all.

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See Transaction Access

What Someone Can Do to It

Create it, edit its fields, change its status, delete it: granted per user, per location.

Permissions decide what someone can do to a transaction: create it, edit its fields, change its status, or delete it. You set them per user, per location.

See Transaction Permissions

Who Can See a Document

Access to the transaction comes first, then the permission category on the doc decides. Filed under Buyer, the listing agent cannot open it.

Two things decide who can see a document: whether the person can get to the transaction it lives on, and which permission category the doc was filed under.

See Document Access

What Someone Can Do With Documents

Upload, assign, review, delete: separate permissions, each granted per location.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions