How a Transaction Moves Through Pipeline

One listing agreement arrives and one file carries the deal to the closing table: the transaction is built from the contract, the checklist applies itself, documents and email land on the record, signatures come back on their own, and the commission becomes a CDA.

Introduction

Behind every closing is a pile of work that has nothing to do with the property. Documents to collect, deadlines to watch, compliance to prove, messages to send, a commission to split. In most offices that work is spread across an inbox, a shared drive, a spreadsheet, and a separate e-sign tool, and the transaction coordinator is the only thing connecting them.

Pipeline is built so the transaction itself is the connection. Take one listing from the moment the agreement comes in to the day the commission is paid, and at every stop the work happens on the same file. Nothing needs a second system, and nothing is retyped that a document already says.

1. Start the File From the Listing Agreement

Click [Add Transaction], then [Create from Document], and upload the signed listing agreement. Pipeline reads it while you keep working, and a few moments later the transaction is waiting for review with the address, MLS number, dates, price, commission terms, and the sellers filled in. Nothing is saved until you say so. Click any field's document icon and the source is highlighted in the PDF, so you approve what you can see rather than trust what you cannot.

Upload a signed contract and a filled-in transaction comes back — AI Create does the typing, so you review what Pipeline pulled, add what's missing, and save.

See AI Create

2. Let the Right Checklist Apply Itself

A buyer file, a listing, a commercial deal, and a lease each follow a different process, and offices and teams differ again. Build one checklist template per process, then give each a rule: apply when the status, side, or label matches. From then on the checklist lands on every new transaction that fits, and nobody remembers which list goes with which file.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules

3. Get Every Document Onto the File

Documents arrive two ways. Drag them into the transaction, or email them to your maildrop address for the transaction and Pipeline pulls the attachments in. Uploaded docs land in the doc list straight away. Emailed ones wait in Unassigned, already pointed at the transaction, until someone files them. Every arrival, review, and change is written to the Transaction History with a name and a time.

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

An admin signs off on each document by checking Reviewed, which clears it from the Unreviewed queue and records who reviewed it and when. That record is what an auditor asks for years later, and Pipeline keeps the data for at least ten years from the day a transaction is created.

You sign off on a doc by checking Reviewed — that clears it from the queue, locks it against edits, and records who reviewed it and when.

See Doc Review

4. Update the File From the Next Document

When the counter-offer or the amendment arrives, do not compare it to the transaction by eye. Add the document and choose [Update Transaction]. Pipeline reads it against what the file already holds, shows each field that changed with its source in the document, and applies only what you accept.

A counter-offer lands, the terms change, and you never retype a field — AI Update reads the new document, shows you what moved and where, and you decide what to apply.

See AI Update

5. Send the Routine Messages From a Template

The welcome to the seller, the check-in to the buyer, the note to the lender: most of a deal's email is the same email with different details. Write each once as a message template with autofill tags, and the address, the names, and the dates fill from the transaction you send from. Every message is logged on the file.

Save a message you send often, then reuse it in a couple of clicks the next time a transaction needs it.

See My Templates

The set of templates most offices build first is in Build the Message Templates Your Office Sends Every Week.

6. Collect the Signature Without Leaving the File

When the seller needs to sign the amendment, send it from the transaction as a Pipeline eSign request. Build the amendment once as a form with the signers named and the fields placed, and transaction details already filled, so it goes out the same way every time. Track who has signed from the eSign page. When the last signature lands, the signed document comes back to the transaction on its own. Requests are priced per request, and a master admin sets the most the office can spend in a month.

Turn a PDF from your Reference page into a reusable form with the signers named, the fields placed, and transaction details already filled in — so the doc your office sends most goes out the same way every time.

See eSign Forms

7. Enter the Commission and Let Pipeline Build the CDA

As closing approaches, the sale price and the commission terms are already on the transaction. Enter the commission percentage, any referral, any deductions, and the split between the people on the deal. Caps, tiered plans, and referral structures all fit the same entry. The moment you save, Pipeline produces the Compensation Disbursement Authorization from those numbers and files it with the transaction's financial documents. Change a number and the CDA is rebuilt.

The Compensation Disbursement Authorization tells your closing agent how the commission should be split — and Pipeline builds it from the numbers you enter on the transaction.

See CDA Generation

8. Read the Numbers Without a Spreadsheet

Because the commission lives on the same record as the deal, the month-end questions are reports, not projects. Commission & Closings is the closed-business record with what the company collected and paid out. Agent Production puts every agent on one page with units, volume, fees, and commission.

The closed-business record — every closed transaction in your period, with the commission and fees your company collected and what it paid back out.

See Commission & Closings

Every agent on one page: pending and closed units, sales volume, fees, deductions, and commission, all in a single download.

See Agent Production

Where to Go Next

If you are an agent, start with getting into Pipeline and getting your documents in. If you run the office, start with setting up the company and building the checklists.