

Create a Transaction

SUMMARY

This article explains how to add a transaction in Paperless Pipeline.

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Create a Transaction

To create a transaction in Paperless Pipeline:

- 1 Click **[Add Transaction]**.
- 2 **Enter information about the transaction.** You can always update existing information or add more information later.
- 3 Click **[Add Transaction]** to save.

Location

Enter the location associated with this transaction.

 For security reasons, only admin can change the location after the transaction has been created.

Transaction Name / Property Address

It's good policy to choose a naming convention for transactions in your company. Most companies use the property address as the name of the transaction. To help support naming conventions, admins can [define custom naming instructions](#) → for the Transaction Name field from the admin

area.

Whenever your transaction name ends in a 5 digit zip code, the system will [extract that zip code](#) → and associate it with that transaction. You can later filter and report on transactions based on a zip code.

The Transactions page allows you to sort by transaction name, so the naming convention you choose should reflect how you'd like to view the transactions on that page.

Status

Select the stage that best describes the current status of the transaction.

Label

A transaction label is used to categorize a transaction (for example, Residential Listing, Condominium, Office Space, Rental Listing, etc.) You can filter and search transactions based on their label.

Close Date

Enter the expected close date for this transaction in the format m/d/yyyy.

Listing Date

Enter the listing date for this transaction in the format m/d/yyyy.

Expiration Dates

Manage Expiration Dates Manually

Use this mode if you wish to manage expiration dates manually. In this mode, Pipeline will treat the transaction expiration date as any other ordinary date field and will not use it to automatically change your transactions to the Expired/Withdrawn status.

Automatic Expiration Mode

In this mode, Pipeline will automatically change transactions to an Expired/Withdrawn status if they remain in the listing status after their expiration date has passed. This mode is used by a majority of the offices that use Pipeline and is the default mode.

When this setting is enabled Pipeline will automatically expire transactions that are in listing status if they haven't been changed to pending or another status by their expiration date. When Pipeline automatically expires such transactions it will change them to the Expired/Withdrawn status and will remove the expiration date.

[Learn more about managing expiration dates →](#)

Acceptance Date

Enter the acceptance date for this transaction in the format m/d/yyyy.

More Info

Enter information about this transaction not covered by other fields. For example, escrow #, referral source, etc.

[Learn to set default info for the More Info field →](#)

Buyer Name

Enter the name of the home buyer.

Seller Name

Enter the name of the home seller.

List Price

Enter the current list price of the home.

Total Commission

Enter the estimated commission here to help track revenue.

Commission Summary

Elaborate on the commission here, if necessary.

Admin Info

Enter additional information here that is *only* visible to admin staff but not to agents on this transaction.

Assign Agents

To assign an in-house agent to a transaction:

- 1 In the *Assign Agents* box, **start typing the agent's name**.
- 2 From the resulting list, to the left of the agent's name, **select the appropriate box under Listing or Selling**, depending on whether the agent is on the listing or selling side of the transaction.

Listing agents can view all Listing, Sale, and Public Docs in this transaction.

Selling agents can view all Sale, Buyer, and Public Docs in this transaction.

Outside (Co-op) Agents

When agents outside your company are involved in a transaction, you can add their information toward the bottom of the Edit Transaction page. This information is for reference only; these agents won't have access to the transaction. Enter the co-op agent's email address to allow for easy drag-and-drop emailing to the agent.

Learn more about [Emailing Outside/Co-op Agents](#) →

Learn more about [Dragging and Dropping Comments to Notes](#) →