

Managing New Offers

SUMMARY

Use the New Offer feature when a listing gets one or more New Offers or falls through and needs to be turned into a new listing.

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What is a New Offer?

The New Offer feature is used to create a copy of an existing transaction. Creating a New Offer will copy over the following data from the original transaction:

- All listing agents
- All docs (except sale docs and buyer docs)
- All checklist tasks except selling agent tasks (optionally)
- All notes (optionally)

Since no sale-specific information is carried over to the new transaction, creating a New Offer transaction keeps sale documents, tasks, and other activities separate.

Create a New Offer

To Create a New Offer in Paperless Pipeline:

- 1 Open the transaction and click [New Offer] from the left menu.
- 2 Check [Copy over all checklist tasks] and/or [Copy over all notes to the new transaction] to copy all items from the original transaction to the New Offer. If you don't want the checklist tasks or notes copied, leave the boxes unchecked.

New Offer for 64838 Main Street

New Offer Information

Transaction Name

Copy over all checklist tasks (except those assigned to selling agents)

Copy over all notes to the new transaction

3 Click [Create Offer] to create your New Offer. All New Offers are linked in the "Original Offer" box of the original transaction.

The screenshot shows the 'View Transaction' page for '64838 Main Street (#2)'. The 'Original' field in the metadata section is highlighted with a red box, and a dropdown menu is open, showing the selected item '64838 Main Street' with a red border. Other metadata includes: Label: Property Management, Status: Pending, Side: Listing, MLS #: 18r939, Listed On: Dec 1, 2017, Location: Broadway and 11th office, Commission Summary: =3%, Added On: Mar 25, 2019, Added By: Rachel McWhirter.

When creating a New Offer, you can choose whether you'd like checklists to be copied over. Checklist tasks visible only to selling agents will never be carried over.

The New Offer option is available to admins and agents who have the "Create Transactions" permission. [Learn more about Managing User Permissions](#) →

When to Add a New Offer

The New Offer feature is most appropriate for managing multiple offers on a listing. This feature is most useful when a pending offer on a listing has fallen through (or was cancelled/terminated for any reason) and there's now a New Offer on the same listing. This feature is also useful when a deal has fallen through and you now need to track new activity on the deal isolated from the fallen-through transaction.

This feature may also be used in other situations where you need a copy of a transaction, including:

- **When a *subsequent* New Offer comes in.** Do not use New Offer for the *first* offer. Store the first

offer in the original transaction.

- **Re-list a transaction whose offer has fallen through.**
- **Add a backup offer on a transaction.**

The first 5 New Offers on a transaction do not count against your monthly quota. All subsequent New Offers related to the transaction will be counted against your quota.

Managing New Offers

Each New Offer transaction can be handled the same as any other transaction, with its own tasks, status changes, and other activities that can be managed independently. For example, if any particular offer closes, update the status in the appropriate transaction.

Store the original offer information in the original transaction. If that offer falls through, *then* create a New Offer to separately track the two offers. And if that falls through and there's an additional offer, add a second New Offer to track the three of them separately in separate transactions - and so on.

Paperless Pipeline Pro Webinar: New Offer

This Pipeline Pro session covers the New Offer feature: how it works, when to use it, and all its wonderful perks.

🕒 10:26

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