

# Manage Transactions

Use transactions to store and track all the aspects of a listing or purchase. Once a transaction is added to your company's account, it can be viewed and edited by the transaction's agents and admins.

## Introduction

A *Transaction* in Paperless Pipeline is the container for all the things related to a real estate listing or purchase being handled by your company.

It contains all the relevant dates and information, as well as *Checklists & Tasks* to help drive transactions to completion, *Documents* for history and compliance purposes, *Contacts* for quick reference and use, *Messaging* for simple, documented communication, and more!

## View a Transaction

View a transaction in your company's Paperless Pipeline account.

**Who Can Do This?** A transaction can be viewed by in-house agents added to the transaction and admins with permission to *View all transactions* (in the transaction's *Location*).

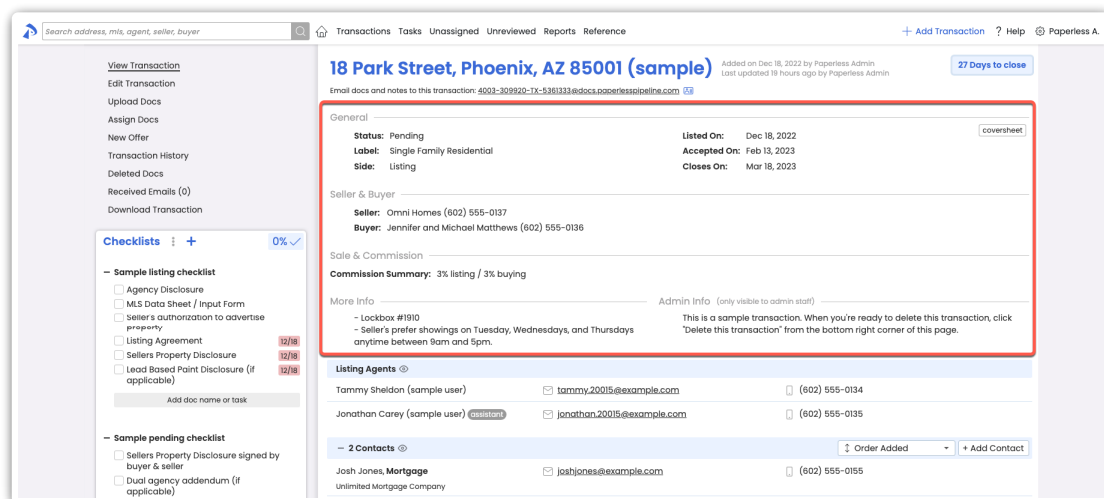
To view a transaction:

- 1 **Find the transaction you want to view.** You can find active transactions on your [Transactions List](#), or find inactive transactions by searching for them. [Learn how](#) →
- 2 **Open the transaction** by clicking the *Transaction Name* or *Property Address*.
- 3 **View areas of the transaction** ([described below](#)).

## Transaction Information

The *Info* sections at the top of the transaction display important dates and other information related to the transaction's listing, contract, or commission.

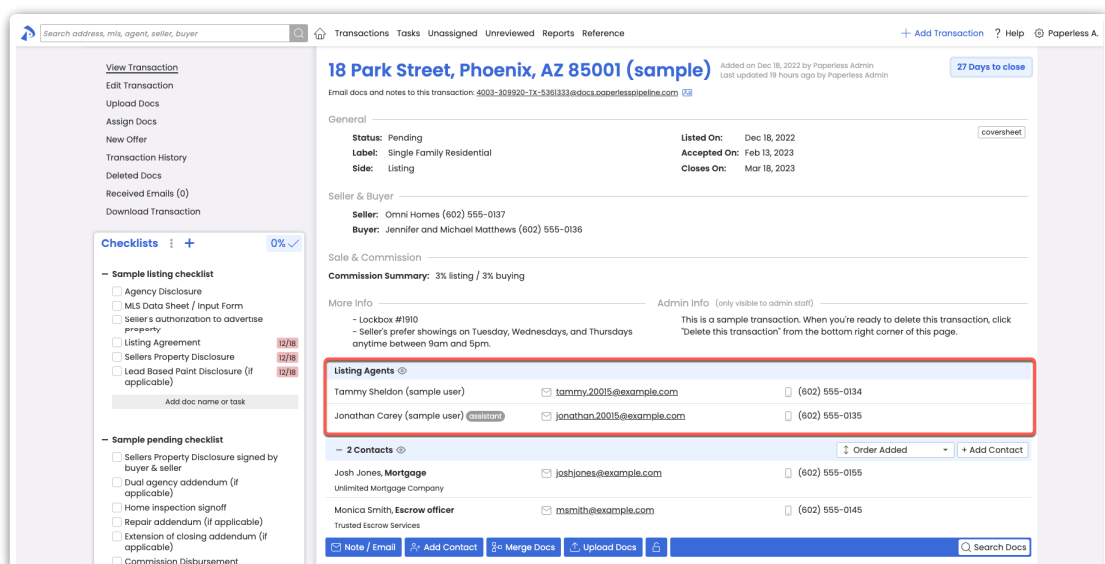
This *Information* can be entered when the transaction is added or edited.



## Agents Involved

The *Listing Agents* and *Buying Agents* sections display the in-house agents and assistants added to the transaction and granted access to it.

They also display *Outside (Co-Op) Agents* who do not have access to the system.



## Checklists & Tasks

The *Checklists* section displays *Tasks* to be completed on the transaction, including what documents need to be uploaded, what actions need to be performed, or any other responsibilities that help drive it to completion.

Checklists can be added to transactions automatically or manually by agents and admins (with the appropriate permissions). [Learn more about Checklists & Tasks](#) →

The screenshot shows a web application interface for transaction management. On the left, a sidebar contains a 'Checklists' section with two categories: 'Sample listing checklist' and 'Sample pending checklist'. The 'Sample listing checklist' includes items like 'Agency Disclosure', 'MLS Data Sheet / Input Form', 'Seller's authorization to advertise property', 'Listing Agreement', 'Sellers Property Disclosure', and 'Lead Based Point Disclosure (if applicable)'. The 'Sample pending checklist' includes items like 'Sellers Property Disclosure signed by buyer & seller', 'Dual agency addendum (if applicable)', 'Home inspection signoff', 'Repair addendum (if applicable)', 'Extension of closing addendum (if applicable)', 'Commission Disbursement Authorization', 'Cooperating broker's commission agreement', 'Buyer Preapproval', 'Lead Based Point Disclosure signed by buyer & seller (if applicable)', 'Change status to pending in MLS (if applicable)', 'Executed purchase contract', and 'Counter offer'. The main content area displays transaction details for '18 Park Street, Phoenix, AZ 85001 (sample)'. It includes a 'General' section with status (Pending), label (Single Family Residential), and side (Listing). It also shows 'Seller & Buyer' information, 'Sale & Commission' summary (3% listing / 3% buying), and 'More Info' (Lockbox #1910). A 'Listing Agents' table lists Tammy Sheldon and Jonathan Carey. A '2 Contacts' table lists Josh Jones (Mortgage) and Monica Smith (Escrow officer). At the bottom, a 'Document Name' table lists 'Listing Docs' and 'Sale Docs' with their respective dates and review status.

## Contacts

The *Contacts* section displays a list of third-party *Contacts* involved with the transaction.

*Contacts* can be added to the transaction by agents or admins. [Learn more about Contacts](#) →

This screenshot is identical to the one above, showing the same transaction details for '18 Park Street, Phoenix, AZ 85001 (sample)'. However, a red rectangular box highlights the '2 Contacts' table. The table lists two contacts: Josh Jones, Mortgage (Unlimited Mortgage Company) with email jashjones@example.com and phone (602) 555-0155; and Monica Smith, Escrow officer (Trusted Escrow Services) with email msmith@example.com and phone (602) 555-0145. The interface also shows the 'Listing Agents' table and the 'Document Name' table at the bottom.

## Docs

The *Docs* section displays documents based on your role on the transaction. For example, if you're a *Listing Agent*, you'll be able to see *Listing Docs*, *Sale Docs*, *Public Docs*, and docs you set to *Private*.

*Docs* can be added to transactions by agents and admins (with the appropriate permissions).

[Learn more about Uploading Docs →](#)

The screenshot shows the 'Docs' section of a transaction management system. The main content area displays transaction details for '18 Park Street, Phoenix, AZ 85001 (sample)'. The 'Docs' section is highlighted with a red box and contains a table of documents:

Document Name	Added On	Reviewed
<b>Listing Docs</b> - visible to listing agents on this transaction and office staff		
MSS Listing Agreement	Feb 18, 2023	<input type="checkbox"/>
Sellers Property Disclosure	Dec 18, 2022	<input type="checkbox"/>
<b>Sale Docs</b> - visible to listing and buying agents on this transaction and office staff		
EMD Earnest Money Deposit	Feb 14, 2023	<input type="checkbox"/>
Lead-Based Paint Disclosure	Feb 14, 2023	<input type="checkbox"/>
Sample Purchase Contract	Feb 13, 2023	<input type="checkbox"/>

Below the table is the 'Notes & Sent Emails' section, which includes a note from Tammy Sheldon (sample user) dated Feb 13, 2023, regarding a missing signature on page 8 of the purchase contract.

## Notes & Sent Emails

The *Notes & Sent Emails* section lists all notes and emails sent from the transaction.

*Notes & Emails* may be sent from the transaction by agents and admins [Learn more about Emailing Docs & Notes from a Transaction →](#)

## Received Emails

Received Emails can be viewed by clicking *Received Emails* on the left menu.

Agents and admins (with the appropriate permissions) can send emails to the transaction. Agents can only view emails they send to transactions, and admins can view all received emails. [Learn more about Received Emails](#) →

## Transaction History

Transaction History can be viewed by clicking *Transaction History* on the left menu.

Agents and admins can view the *Transaction History*, but will only see the information that is relevant to them.

## Add a Transaction

Add a new transaction to start tracking it in your company's account.

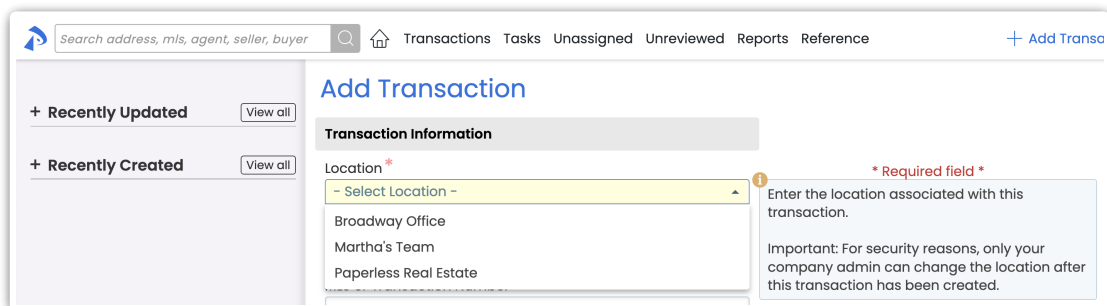
**Who Can Do This?** A transaction can be added by admins and agents with permission to *Create transactions*.

To create a new transaction:

- 1 Click [Add Transaction] from the upper right corner of any page.  
Or, add a transaction using keyboard shortcuts, Ctrl + Alt + T (Windows) / Ctrl + Opt + T (MacOS).
- 2 Add the information you have available for the transaction (outlined below), then save.

### Location

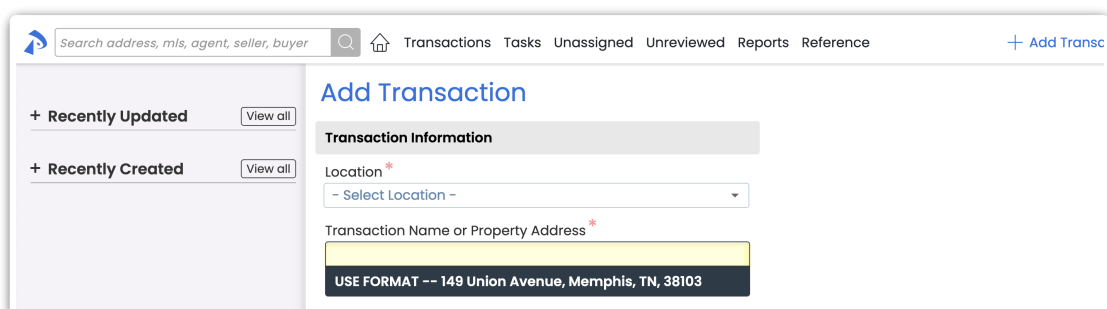
Select the *Location* associated with the transaction (if applicable).



The screenshot shows the 'Add Transaction' form in a web application. The form is titled 'Add Transaction' and has a search bar at the top. The 'Transaction Information' section is highlighted. The 'Location' field is a dropdown menu with the following options: '- Select Location -', 'Broadway Office', 'Martha's Team', and 'Paperless Real Estate'. A red asterisk indicates that this field is required. A tooltip message says: '\* Required field \* Enter the location associated with this transaction. Important: For security reasons, only your company admin can change the location after this transaction has been created.'

### Transaction Name or Property Address

Enter the *Transaction Name* according to your office's preferred naming convention.



The screenshot shows the 'Add Transaction' form in a web application. The form is titled 'Add Transaction' and has a search bar at the top. The 'Transaction Information' section is highlighted. The 'Location' field is a dropdown menu with the following options: '- Select Location -'. The 'Transaction Name or Property Address' field is a text input field with a red asterisk indicating it is required. Below the input field, there is a dark blue button with the text 'USE FORMAT -- 149 Union Avenue, Memphis, TN, 38103'.

## MLS or Transaction Number

Enter the *MLS or Transaction Number*.

MLS or Transaction Number <input type="text"/>	<b>i</b> Enter the MLS or transaction number. For example: 123456
Status* <input type="text"/>	

## Status

Select the *Status* that best describes the current stage of the transaction.

Status* - Select Status - <b>Active</b> Active <b>Listing</b> Listed <b>Pending</b> Ready to Close Under Contract <b>Other</b> Referral	<b>* Required field *</b> <b>i</b> Select the stage that best describes the current status of the transaction.
---	---

## Label

Select the *Label* that best applies to the transaction.

Label - Select Label - Commercial Condo Land and Lot New Build Residential	<b>i</b> Select the label that best applies to the transaction.
--	---

## Listing, Expiration, Acceptance & Close Date

Select or enter the *Listing Date*, *Expiration Date*, *Acceptance Date* and *Close Date* for the transaction in the format mm/dd/yy.

Listing Date 07/28/2023	Automatic Expiration Date
Acceptance Date	Close Date

**August 2023**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

**i** Enter the acceptance date in the format m/d/yyyy.

## Contingency Dates

Select or enter the *Contingency Dates* for the transaction in the format mm/dd/yy.

**Contingency Dates**

Earnest Money Due Date	Earnest Money Deposit Date
<input type="text"/>	<input type="text"/>
Inspection Due Date	Inspection Date
<input type="text"/>	<input type="text"/>
Loan Approval Due Date	Loan Approval Date
<input type="text"/>	<input type="text"/>
Appraisal Due Date	Appraisal Date
<input type="text"/>	<input type="text"/>
Option Period End Date	
<input type="text"/>	

**i** Enter the earnest money due date for this transaction in the format m/d/yyyy.

## Additional Information

Complete any *Other Information* or *More Info* requested by your office.



**Other Information**

In-house TC <input type="text" value="Select an Option"/>	Photography Shoot <input type="text"/>
City <input type="text" value="Select an Option"/>	Entry Instructions <input type="text"/>

More Info

Property URL -  
 FSBO -  
 Lock box - #  
 Year Built -  
 HOA -  
 Home Warranty -  
 Legal Description - \_\_\_\_\_

## Admin Info

For admins only, enter any *Admin Info* that should only be seen by admins and not be visible to agents.

Admin Info (only visible to admin staff)

Flagged for Admi's Review - Enter Y or N  
 Transaction Coordinator Requested - Enter Y or N  
 Agent's Plan - Enter BASIC or PREMIUM  
 Special Notes - \_\_\_\_\_

## Seller Name & Lead Source

Enter the *Seller Name* & *Seller Lead Source* (if applicable).

— Buyer, Seller, Pricing, etc.
Hide

Seller Name <input type="text"/>	Seller Lead Source <input type="text" value="- Select Lead Source -"/>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span style="font-size: 0.8em; margin-right: 5px;">i</span>           Enter the name of the home seller.         </div>
-------------------------------------	---	---

add seller as contact

## Add Seller Contact

Optionally, add the *Seller* as a *Contact* on the transaction by clicking [add seller as contact] and then entering their *Address, Email, Phone, and Fax / Other*.

– Buyer, Seller, Pricing, etc.
Hide

Seller Name \*

[add seller as contact](#)

Seller Lead Source

Seller Address

Seller Email

Seller Phone

Seller Fax / Other

Buyer Name

[add buyer as contact](#)

Buyer Lead Source

### Buyer Name & Lead Source

Enter the *Buyer Name* & *Buyer Lead Source* (if applicable).

Buyer Name

[add buyer as contact](#)

Buyer Lead Source

i Enter the name of the home buyer.

### Add Buyer Contact

Optionally, add the *Buyer* as a *Contact* on the transaction by clicking [add buyer as contact] and then entering their *Address*, *Email*, *Phone*, and *Fax / Other*.

— Buyer, Seller, Pricing, etc.
Hide

<p>Seller Name</p> <input style="width: 90%;" type="text"/> <p><a href="#">add seller as contact</a></p>	<p>Seller Lead Source</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> <span>- Select Lead Source -</span> <span>▼</span> </div>
<p>Buyer Name *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex;"> <input style="width: 80%;" type="text" value="Curtis Yobcow"/> </div> <p><a href="#">add buyer as contact</a></p>	<p>Buyer Lead Source</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between;"> <span>Social Media</span> <span>✕ ▼</span> </div>
<p>Buyer Address</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #fff9c4;"> <input style="width: 90%;" type="text" value="910 Tiger Avenue"/> </div>	<p>Buyer Email</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #fff9c4;"> <input style="width: 90%;" type="text" value="curtis@paperlesspipeline.cc"/> </div>
<p>Buyer Phone</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #fff9c4;"> <input style="width: 90%;" type="text" value="555-555-4444"/> </div>	<p>Buyer Fax / Other</p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #fff9c4;"> <input style="width: 90%;" type="text" value="555-555-4445"/> </div>
<p>List Price</p> <div style="border: 1px solid #ccc; padding: 2px;"> <input style="width: 90%;" type="text" value="\$"/> </div>	

### List Price

Enter the current *List Price*.

List Price

i Enter the current list price of this house.

### Sale Price

Enter the *Sale Price* if the property is already under contract.

Sale Price

i If this home is already under contract, enter the sale price here.

### Total Commission

Enter the estimated *Total Commission*.

Total Commission <input type="text" value="\$"/>	<span style="color: orange;">i</span> Enter the estimated commission here to help track revenue.
---	--

## Commission Summary

Elaborate on the commission in the *Commission Summary*, if necessary.

Commission summary <input style="background-color: #ffffcc;" type="text" value="Earnest Money Amount - \$&lt;br/&gt;Commission Percent - \$&lt;br/&gt;Broker Commission - \$&lt;br/&gt;Referral Fee - \$"/>	<span style="color: orange;">i</span> Elaborate on the commission here, if necessary.
--	---

## Assign Agents

In the *Assign Agents* section, add any in-house agents and assistants to the transaction.

### Add an Agent

For each agent, search for their name or find it in the list, then check the appropriate *Listing* or *Buying* box next to it.

*Assigned Agents* will appear on the right.

<b>Assign Agents</b> Search by agent name or select by location <input style="border: 2px solid red;" type="text" value="Search by name"/> <hr/> <b>– Broadway Office</b> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Listing</th> <th style="text-align: left;">Buying</th> <th style="text-align: left;">Agent</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Jacqueline Apple</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Hollis Holcomb</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Albert Jacks</td> </tr> </tbody> </table> <hr/> <b>– Martha's Team</b> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Listing</th> <th style="text-align: left;">Buying</th> <th style="text-align: left;">Agent</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Martha Jewel</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Lucy Rose</td> </tr> </tbody> </table> <hr/> <b>– Paperless Real Estate</b> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Listing</th> <th style="text-align: left;">Buying</th> <th style="text-align: left;">Agent</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Robert Zimmerman</td> </tr> </tbody> </table>	Listing	Buying	Agent	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jacqueline Apple	<input type="checkbox"/>	<input type="checkbox"/>	Hollis Holcomb	<input type="checkbox"/>	<input type="checkbox"/>	Albert Jacks	Listing	Buying	Agent	<input type="checkbox"/>	<input type="checkbox"/>	Martha Jewel	<input type="checkbox"/>	<input type="checkbox"/>	Lucy Rose	Listing	Buying	Agent	<input type="checkbox"/>	<input type="checkbox"/>	Robert Zimmerman	<b>Assigned Agents</b> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Listing</th> <th style="text-align: left;">Buying</th> <th style="text-align: left;">Agent</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>Jacqueline Apple</td> </tr> </tbody> </table>	Listing	Buying	Agent	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jacqueline Apple
Listing	Buying	Agent																																
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jacqueline Apple																																
<input type="checkbox"/>	<input type="checkbox"/>	Hollis Holcomb																																
<input type="checkbox"/>	<input type="checkbox"/>	Albert Jacks																																
Listing	Buying	Agent																																
<input type="checkbox"/>	<input type="checkbox"/>	Martha Jewel																																
<input type="checkbox"/>	<input type="checkbox"/>	Lucy Rose																																
Listing	Buying	Agent																																
<input type="checkbox"/>	<input type="checkbox"/>	Robert Zimmerman																																
Listing	Buying	Agent																																
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jacqueline Apple																																

### Designate an Assistant

You can also add assistants by adding them as agents, then clicking [make assistant] next to their name.

Assistants will appear in the *Assigned Assistants* section on the right.

Assign Agents		Search by agent name or select by location	
Search by name			
- Broadway Office			
Listing	Buying	Agent	
<input type="checkbox"/>	<input type="checkbox"/>	Jacqueline Apple	
<input type="checkbox"/>	<input type="checkbox"/>	Hollis Holcomb	
<input type="checkbox"/>	<input type="checkbox"/>	Albert Jacks	
- Martha Jewel Team			
Listing	Buying	Agent	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Martha Jewel	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lucy Rose	

Listing	Buying	Agent
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Martha Jewel
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lucy Rose

## Outside (Co-op) Agents

If agents outside your company are involved in the transaction, check the box next to [This transaction has outside (co-op) agents], then enter the *Outside Listing Agent* or *Outside Buying Agent's Name / Info, Email, and Phone*.

*Outside (Co-op) Agents* can be added for reference only and will not have access to the transaction.

This transaction has outside (co-op) agents

Outside Listing Agent

Name / Info:

Email:

Phone:

Outside Buying Agent

Name / Info:

Email:

Phone:

When you have more information later, you can come back to the transaction and edit it [Learn how](#) →

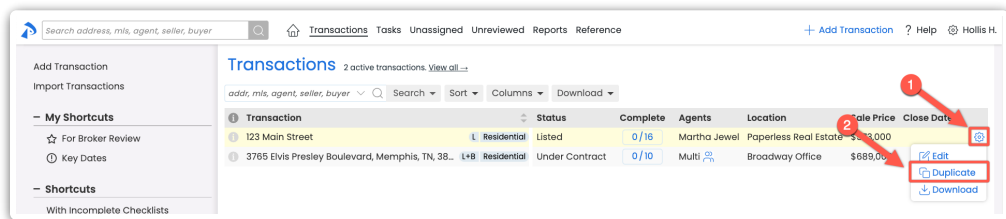
# Duplicate A Transaction

**Duplicate a transaction** to save time by creating a new transaction based on an existing one. For example, duplicate a transaction to start over when a buyer's offer falls through, duplicate a template transaction to use default info for certain transactions, and duplicate a single transaction multiple times to handle a parcel of properties.

**Who Can Do This?** Admins can duplicate transactions.

To duplicate a transaction:

- 1 Go to the **Transactions List** page by clicking [Transactions] from the top menu.
- 2 Click the transaction's gear, then [Duplicate].



**Need to re-list or add an additional offer to an existing transaction? Use [New Offer](#) instead. [Learn more about New Offer](#) →**

- 3 If needed, update the **Transaction Name** for the copied transaction.

### Duplicate 123 Main Street

Need to re-list or add an additional offer to an existing transaction?  
Use [New Offer](#) instead of Duplicate.

**Duplicate Transaction Options**

Transaction Name\*

Copy over all docs (with new upload dates, no activity)

Copy over all checklists (with no activity)

**Information:** Duplicate 123 Main Street into a new transaction.

The following data will be copied over to the new transaction:

- All transaction fields except MLS Number
- All agents
- All contacts

4 Check the additional items you want to copy over:

- Click [Copy over all docs] to copy over all docs. Copied docs will have new upload dates with no review / comment activity.
- Click [Copy over all checklists] to copy over all checklists with no activity. If unchecked, any checklists set to be auto-applied will still be added.

## Duplicate 123 Main Street

Need to re-list or add an additional offer to an existing transaction?  
Use [New Offer](#) instead of Duplicate.

**Duplicate Transaction Options**

Transaction Name \*

  
 Copy over all docs (with new upload dates, no activity)  
 Copy over all checklists (with no activity)

5 Click [Duplicate Transaction] to create a copy of the transaction.

## Duplicate 123 Main Street

Need to re-list or add an additional offer to an existing transaction?  
Use [New Offer](#) instead of Duplicate.

**Duplicate Transaction Options**

Transaction Name \*

  
 Copy over all docs (with new upload dates, no activity)  
 Copy over all checklists (with no activity)

## 6 Add or update any new information for the copied transaction, then save it.

The transaction below was successfully duplicated from 123 Main Street.

Search address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help Hollis H.

Edit Transaction

Upload Docs

Assign Docs

Transaction History

Received Emails (0)

Download Transaction

-- Go back to Copy of 123 Main Street

Checklists + 0% ✓

Residential Listing

- Purchase Agreement 9/29
- Seller's property disclosure 7/12
- Agency Disclosure
- Lead based paint addendum (if applicable) 8/3
- MLS input sheet
- Seller's authorization to advertise property

Transaction Information Save Transaction

Location \* Paperless Real Estate

Transaction Name or Property Address \* Copy of 123 Main Street

MLS or Transaction Number

Status \* Listed

Label Residential

Listing Date 07/20/2023 Automatic Expiration Date 08/20/2024

Acceptance Date 08/28/2023 Close Date


## Edit a Transaction

Edit a transaction in your company's account to make any necessary updates to the information.

**Who Can Do This?** A transaction can be edited by agents added to the transaction and admins.

To make changes to a transaction:

- 1 Go to a transaction.
- 2 Click [Edit Transaction] from the left menu.
- 3 Add or update any new information you have for the transaction (described above), then save it.

 The ability to edit certain fields on a transaction varies. If you need to update a certain field and are unable to do so, ask your admin to make the change for you. [Learn more →](#)

## Delete a Transaction

Permanently remove a transaction from your Paperless Pipeline account.



---

**Who Can Do This?** Master admins can permanently remove transactions.

To delete a transaction permanently:

- 1 Go to a transaction.
- 2 Scroll to the bottom, then select [Delete this transaction] in the lower right corner.
- 3 Confirm permanent deletion of the transaction by clicking [Delete Permanently].