

Pipeline AI Create

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.

Introduction

Opening a new file means reading the contract and typing what it says into the transaction form: the address, the dates, the price, the people. With [Pipeline AI](#), AI Create does that typing for you. You hand Pipeline the signed contract, listing agreement or intake form, alone or with the addendum that goes with it, and the *Add Transaction* form comes back filled in.

Admins and agents use it whenever a new deal comes in. Typing from a contract is where mistakes get in. AI Create shows each value beside the text it came from, so you can check the form against the contract before you save.

How It Works

Give It One Doc or Multiple Docs

Hand Pipeline the contract by itself, or select it along with an addendum or a disclosure. Pipeline reads them together and fills one *Add Transaction* form, and each doc lands on the new transaction separately. One create reads up to 50 pages and 40 MB across everything you select.

Every Value Traces Back to the Document

Your result opens as a two-pane review, the filled form on one side and your document on the other. Fields Pipeline filled are marked in blue, and each carries a document icon. Click it and the PDF jumps to the text the value came from. The arrows at the top step through the filled fields in order.

Pipeline Handles Dates and Filing

When a contract states a deadline as a rule, like "inspection 10 days from acceptance", Pipeline works out the calendar date and counts your company's business holidays. When you save, Pipeline files each source doc on the new transaction.

What AI Create Pulls From a Document

- **Transaction information:** the transaction name or property address, MLS or Transaction Number, label, and the listing, expiration, acceptance and expected close dates.

- **Contingency dates:** deadlines the contract states as day-rules.
- **Buyers and sellers:** the parties named on the contract, matched to your existing contacts or added new.
- **Financials:** list price, sale price, total commission, earnest money and financing type.
- **More Info, Admin Info and Commission Summary:** filled from the document, with a short written summary of the notable details.
- **Other property details:** year built, lockbox code and home warranty details.
- **Outside contacts:** the outside (co-op) agent, lender, attorney and title officer, matched or added the same way.
- **Assigned agents:** your office's own agents named in the document, each assigned to the side they're on.
- **Custom fields:** filled when a field's name closely matches how the document labels that value.

Create a Transaction From Docs on Your Computer

Starts an *AI Create* from one or more PDFs you upload.

Who Can Do This: Anyone who can add a transaction by hand, once a master admin has turned on Pipeline AI and your role is included for *AI Create*.

To create a transaction from docs on your computer:

- 1 Click [Add Transaction] from the upper-right corner of any page.
- 2 Choose [Create from Document].
- 3 Pick the PDF or PDFs you want Pipeline AI to read, then click [Create Transaction].

Pipeline reads in the background, usually for about a minute. A green flag on the doc in *Unassigned* shows when your filled form is ready.

Create a Transaction From One Doc in Unassigned

Starts an *AI Create* from a PDF that's already waiting in *Unassigned*.

Who Can Do This: Anyone who can add a transaction by hand, once a master admin has turned on Pipeline AI and your role is included for *AI Create*.

To create a transaction from one doc in Unassigned:

- 1 Click [Unassigned] in the top menu.
- 2 Hover over the doc's row.
- 3 Click the sparkle icon when it turns blue.

A spinner takes the icon's place while Pipeline reads, and a green flag replaces it when your filled form is ready.

Create a Transaction From Multiple Docs in Unassigned

Starts one *AI Create* from two or more docs in *Unassigned* that belong to the same file.

Who Can Do This: Anyone who can add a transaction by hand, once a master admin has turned on Pipeline AI and your role is included for *AI Create*.

To create a transaction from multiple docs in Unassigned:

- 1 Click [Unassigned] in the top menu.
- 2 Check the boxes next to the docs that belong to the file.
- 3 Click [Bulk], then [Create Transaction].

The docs you picked show as one row while Pipeline reads them. Stay on *Unassigned* and the review opens on its own when the read finishes.

Review and Save Your AI Create Result

Takes you from a ready result to a saved transaction.

Who Can Do This: Anyone who can run an *AI Create*.

To review and save your AI Create result:

- 1 Click [Unassigned] in the top menu, then click the green flag on the doc.
- 2 Check each blue field against the document, using the field's document icon to jump to its source.
- 3 Correct anything that's off, and fill any blank by hand.
- 4 Set the transaction status.
- 5 Click [Add Transaction].

You land on the new transaction with the source docs filed in its doc list. Until you click [Add Transaction], nothing has been created, and the result waits for you in *Unassigned*.

Frequently Asked Questions

What kinds of documents can I start from?

Purchase contracts, listing agreements and intake forms. Scanned or digital, hand-signed or e-signed, send it as you have it.

Can I create a transaction from more than one doc?

Yes. Select the contract along with an addendum or a disclosure, and Pipeline reads them together.

What counts as one AI run?

One create or one update. A create from multiple docs is still one run, whatever the page count.

Can I upload one PDF that bundles several forms?

Yes. Pipeline reads the whole file, up to 50 pages, and pulls details from whichever pages carry them.

Do I have to train it or map fields first?

No. Different forms, states and brokerages all run the same way, and Pipeline reads a document the first time it sees it.
