AI Create

Review the *Add Transaction* form AI Create fills in from a contract, then add the transaction.

Introduction

AI Create is the part of Pipeline AI that turns a contract into a new transaction, so you review it instead of typing it in. When someone picks a signed contract, listing agreement or intake form, with any counteroffer or addendum, it reads them and autofills the *Add Transaction* form, dates and deadlines included.

When you open the result, the form is already filled in, and each value sits beside the text it came from, so you can review it against the contract in one place. Fix anything that's off, choose the status, and add the transaction.

Until you add it, there's no transaction, and the contract waits in*Unassigned*.

How It Works

Pipeline Fills the Form, You Review and Add It

AI Create helps you create.

- **Pipeline** reads the contract and any docs you add with it, autofills the*Add Transaction* form, and shows where each value came from.
- **You** review the form against the contract, fix anything that's off, choose the status, and add the transaction.

Give It One Doc or Multiple Docs

Hand Pipeline the contract by itself or select it along with a counteroffer, 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 blue field's document icon takes you to the text its 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. The dates it fills in, including your custom date fields, set the due dates of any tasks tied to them. When you save, Pipeline files each source doc on the new transaction.

What AI Create Fills In

The review is laid out like the form for adding a transaction by hand. Here's what Pipeline fills in from the document, section by section.

- **Transaction Information**: the transaction name or property address, MLS or transaction number, and label.
- **Dates**: the listing, automatic expiration, acceptance and close dates the document gives, and your custom date fields. When the 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. These dates set the due dates of any tasks tied to them.
- **More info, Admin info and Commission summary**: a short, written summary of the notable details. When your office has a default template for one of these, Pipeline fills in the template instead.
- **Buyer, Seller, Pricing, etc.**: the buyers' and sellers' names, list price, sale price and total commission.
- **Contacts**: the people and companies the document names, such as the sellers, the broker, the lender and the home warranty company. Each is added as a new contact for you to review.
- **Assign Agents**: your office's own agents named in the document, each on the side they're on.
- **Outside (co-op) agents**: an agent the document names who isn't in your office.
- **Custom fields**: filled when a field's name closely matches how the document labels the value.

Create a Transaction From One Doc in *Unassigned*

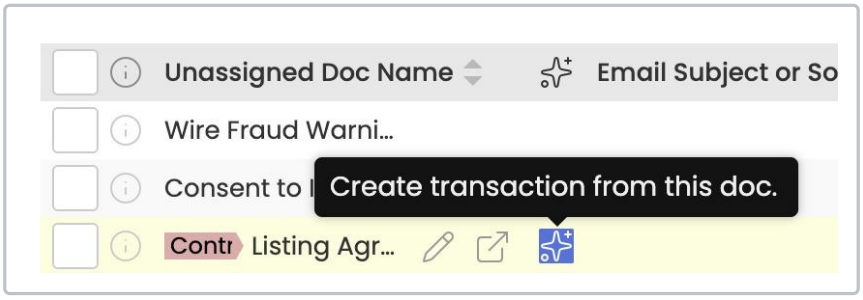
Start from a contract that's already in*Unassigned*.

Who Can Do This: Admins / Staff. When Create is set to Anyone, also anyone who can add a transaction without Pipeline AI.

To create a transaction from one doc in*Unassigned*:

1. Click **[Unassigned]** in the top menu.
2. Hover over the contract's row, and click the sparkle icon that appears.

3. Click **[Create transaction]**.



A spinner shows on the doc while Pipeline reads, usually from a few seconds to about a minute. A green flag replaces it when the form is ready to review.

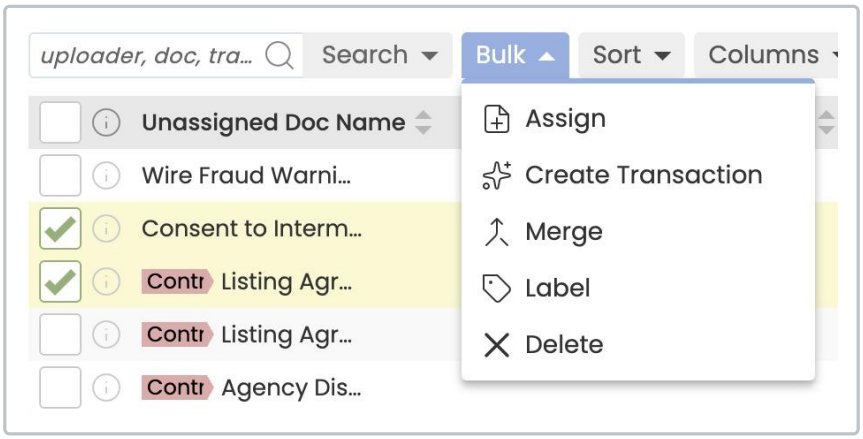
Create a Transaction From Several Docs in *Unassigned*

Start from a contract and the docs that go with it and get one form for the deal.

Who Can Do This: Admins / Staff. When Create is set to Anyone, also anyone who can add a transaction without Pipeline AI.

To create a transaction from several docs in*Unassigned*:

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



The docs show as one row while Pipeline reads them, up to 50 pages and 40 MB in all. Stay on *Unassigned*, and the review opens on its own when the read finishes.

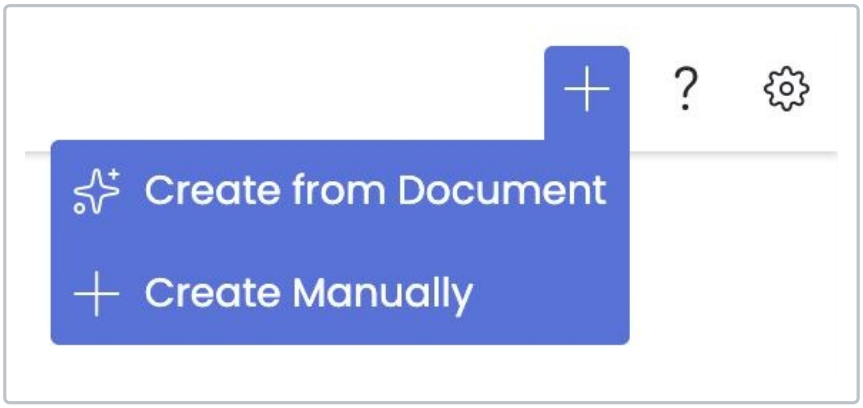
Create a Transaction From Docs on Your Computer

Upload a contract from your computer.

Who Can Do This: Admins / Staff. When Create is set to Anyone, also anyone who can add a transaction without Pipeline AI. Either way, you also need the Upload Docs permission in at least one location.

To create a transaction from docs on your computer:

1. Click the **[+]** in the upper-right corner of any page, then **[Create from Document]**.
2. Drag the PDF or PDFs onto the page, or click to choose them from your computer.
3. Click **[Create Transaction]**.



A green flag on the doc in *Unassigned* shows when the form is ready to review.

Review the Form and Add the Transaction

Review what Pipeline filled in against the contract, fix what's off, and add the transaction.

Who Can Do This: Anyone who can use AI Create.

To review the form and add the transaction:

1. Click the green flag on the doc in *Unassigned*.

   You can also click **[click here to review]** in the message at the top of *Unassigned*. After a Bulk create, the review may already be open.

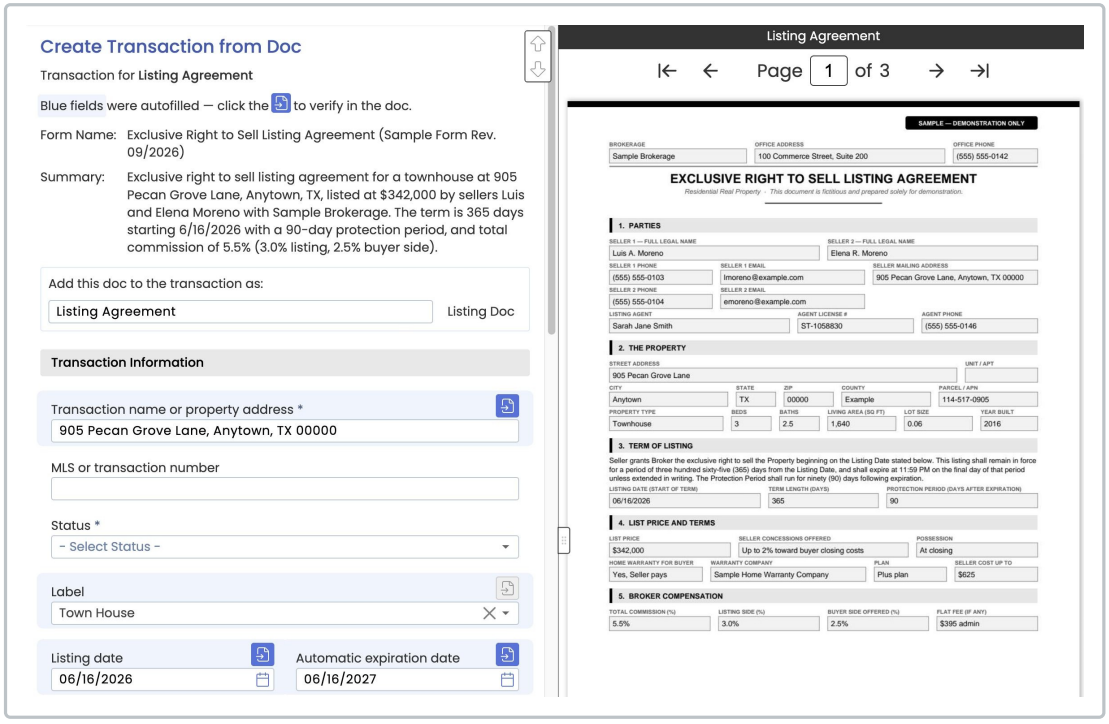
2. Review each blue field against the contract on the right.

   Click a field's document icon to see where its value came from, or use the up and down arrows at the top to step through the filled fields.

3. Correct anything that's off, and fill any blanks by hand.

   Look hardest at the dates. A wrong date carries into every deadline counted from it.

4. Review the contacts, and remove any you don't want with **[Remove from contacts]**.
5. Under *Add this doc to the transaction as*, review the name the doc will be filed under.
6. Choose a status. Pipeline never picks one for you.
7. Click **[Add Transaction]**.



You land on the new transaction with the doc filed on it, and the deal's other docs in *Unassigned* are pre-assigned to it. Until you click [Add Transaction], nothing is created: the doc waits in *Unassigned* with its green flag, and its Assign button stays off.

More Topics

Assign the Deal's Other Docs

Once the transaction exists, the deal's other docs in *Unassigned* turn blue, pre-assigned to the new transaction.

Review the name and transaction AI Assign picked for each new doc in *Unassigned*, then assign it.

See AI Assign

Bring the Deal Up to Date

When new paperwork comes in later, Pipeline reads it against the transaction and fills in what

changed.

Review the changes AI Update pulled from a counteroffer or addendum, then save the ones you want.

See AI Update

Choose Who Can Use AI Create

Who can use AI Create is its own setting, the Create row on the Pipeline AI page.

Choose who can use Pipeline AI, and limit what it costs once your monthly credit is used.

See Pipeline AI Settings

Frequently Asked Questions

Does AI Create run on its own?

No. AI Create helps you create a transaction. It runs only when someone starts it, and nothing is created until they review the form and click [Add Transaction]. Reading each doc as it lands in *Unassigned* is AI Assign's job, and it's included in your plan.

Will it work with our contracts?

Yes. It reads purchase contracts, listing agreements and intake forms, scanned or digital, hand-signed or e-signed, with nothing to set up.

Can I create a transaction from more than one doc?

Yes. Select the contract along with a counteroffer, an addendum or a disclosure, and Pipeline reads them together. One PDF that bundles several forms works too, up to 50 pages.

Does AI Create set up my checklist or task due dates?

Not the checklist itself. Checklists apply the same way they would for a transaction you add by hand. The dates AI Create fills in, including your custom date fields, set the due dates of any tasks tied to them.

Does AI Create use our Pipeline AI credit?

Yes. Every create uses the month's credit first. Past the credit, each create is $1.00, up to your monthly spending limit. Reading counteroffers and addenda with the contract doesn't add to it.