Why Can't an Agent Update a Transaction Field?

Is an agent not able to update a certain field on a transaction?This guide will help you understand what fields may be edited by agents based on general system security as well as the permissions granted to them by an admin.

Reason

When an agent is unable to edit a certain field on a transaction, Pipeline is doing its job and controlling what the agent is allowed to change to protect the integrity of the transaction.

Once a transaction has been added to Pipeline, the system automatically controls what fields a user may edit based on general security rules set by the system and user permissions granted by admins.

Troubleshoot

To troubleshoot this:

1. If you are an agent and unable to edit a certain transaction field, you will need to email your admin to request they make the change for you. Here's how to Contact Your Office Admin →

2. If you are an admin and want to know more about why a specific field is not editable by an agent, check the field below.

Location

For security reason, a transaction's*Location* can only be changed by an admin.

Transaction Name or Property Address

For security reason, a transaction's*Transaction Name or Property Address*can only be changed by an admin.

MLS or Transaction Number

For security reason, a transaction's*MLS or Transaction Number*can only be changed by an admin.

Status

When an agent has been granted permission to *Change Transaction Status,* they can change a transaction's *Status* to one in the *Active, Listing, Pending,* or *Other* category.

When an admin has turned on the option to, *Allow agents to change transaction status to closed, terminated, and expired*, agents with permission to *Change Transaction Status* may also change a transaction's *Status* to one in the *Closed* or *Fell-Through* category.

Label

For security reason, a transaction's *Label* can only be changed by an admin.

Listing Date

Agents that created the transaction can change its *Listing Date* while the transaction is in a *Listing* category *Status.*

Agents with permission to *Change Transaction Status* may edit the *Listing Date* any time.

Expiration Date

Agents with permission to *Change Transaction Status* may edit the *Expiration Date.*

Acceptance Date

Agents with permission to *Change Transaction Status* may edit the *Acceptance Date.*

Close Date

Agents with permission to *Change Transaction Status* may edit the *Close Date.*

Optional Dates / Contingency Dates

Agents with permission to *Change Transaction Status* may edit *Optional Dates / Contingency Dates*.

Optional Fields

Agents with permission to *Change Transaction Status* may edit *Optional Fields.*

Custom Fields

Custom Fields can be edited by any agent.

More Info

More Info can be edited by any agent on the transaction until the transaction is in a *Closed* category *Status*.

Once the transaction is in a *Closed Status*, only agents that created the transaction and have permission to *Change Transaction Status* can update *More Info*.

Admin Info

Admin Info is only visible to admins.

Buyer Name & Lead Source

Buyer Name & *Buyer Lead Source* can be edited by any agent on the transaction until the transaction is in a *Closed* category *Status*.

Once the transaction is in a *Closed Status*, only agents that created the transaction and have permission to *Change Transaction Status* can update *Buyer Name* & *Buyer Lead Source*.

Seller Name & Lead Source

Seller Name & *Seller Lead Source* can be edited by any agent on the transaction until the transaction is in a *Closed* category *Status*.

Once the transaction is in a *Closed Status*, only agents that created the transaction and have permission to *Change Transaction Status* can update *Seller Name* & *Seller Lead Source.*

List Price

List Price can be edited by any agent on the transaction until the transaction is in a *Closed* category *Status*.

Agents with permission to *Change Transaction Status* may edit the *List Price* any time.

Sale Price

Sale Price can be edited by any agent on the transaction until the transaction is in a *Closed* category *Status*.

Agents with permission to *Change Transaction Status* may edit the *Sale Price* any time.

Total Commission

For security reason, a transaction's *Total Commission* can only be changed by an admin.

Commission Summary

Commission Summary can be edited by any agent on the transaction until the transaction is in a *Closed* category *Status*.

Agents with permission to *Change Transaction Status* may edit the *Commission Summary* any time.

In-house Agents

Agents with permission to....

Co-op Agents

Agents with permission to....The ability to add or remove agents, including outside(co-op) agents, depends on whether a user has the permission: Change listing/selling agents of own transaction. If the agent has that permission, they can add or remove agents on their own transactions as long as the transaction is in a pre-pending status. Agents can not add or remove agents once a transaction has reached pending status or beyond.