

Why Can't I Update a Transaction Field?

Is an agent unable to change a certain field on a transaction? For security and administrative reasons, agents' ability to update transactions is limited in Pipeline. This guide explains what is required for agents to edit each transaction field.

Reason

When an agent cannot update a certain field on a transaction, Pipeline is doing its job and limiting what the agent is allowed to change.

Once a transaction has been added, Pipeline automatically controls what fields an agent can edit based on the permissions an admin has granted them and general security rules set by the system. This helps protect the accuracy and reliability of each transaction.

Troubleshoot

To troubleshoot this:

- 1 If you are an agent and not able to update a certain transaction field, ask your admin to update the field for you.
- 2 If you are an admin and want to know what is required for an agent to update a certain field, check the field below.

Location

Location can only be changed by a master admin.

Transaction Name or Property Address

Transaction Name or Property Address can only be changed by admins.

MLS or Transaction Number

MLS or Transaction Number can only be changed by admins.

Status

Status can be updated to an *Active*, *Listing*, *Pending*, or *Other Status* by agents with permission to

Change Transaction Status.

Agents with *Change Transaction Status* permission can also move transactions to a *Closed* or *Fell-Through Status* if that company-wide option is turned on. [Learn more about Managing Agents' Ability to Set Transaction Status to Closed](#) →

Label

Transaction Label can only be changed by admins.

Listing Date

Listing Date can be changed by agents with permission to *Change Transaction Status*.

The agent who created the transaction can change the *Listing Date* as long as the transaction is in a *Listing Status*.

Expiration Date

Expiration Date can be changed by agents with permission to *Change Transaction Status*.

Acceptance Date

Acceptance Date can be changed by agents with permission to *Change Transaction Status*.

Close Date

Close Date can be changed by agents with permission to *Change Transaction Status*.

Optional Dates / Contingency Dates

Optional Dates / Contingency Dates can be changed by agents with permission to *Change Transaction Status*.

Optional Fields

Optional Fields can be changed by agents with permission to *Change Transaction Status*.

Custom Fields

Custom Fields can be changed by any agent on the transaction.

More Info

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

Once the transaction is in a *Closed Status*, *More Info* can only be changed by an agent who both created the transaction and has permission to *Change Transaction Status*.

Admin Info

Admin Info is only visible to admins. It can never be seen or changed by agents.

Buyer Name & Lead Source

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

Once the transaction is in a *Closed Status*, *Buyer Name & Buyer Lead Source* can only be changed by an agent who both created the transaction and has permission to *Change Transaction Status*.

For offices subscribed to Commission Module, *Buyer* cannot be changed by an agent once *Commissions* have been entered for a transaction.

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*, *Seller Name & Seller Lead Source* can only be changed by an agent who both created the transaction and has permission to *Change Transaction Status*.

List Price

List Price can be changed by agents until the transaction is in a *Closed Status*.

An agent who both created the transaction and has permission to *Change Transaction Status* can change the *List Price* any time.

Sale Price

Sale Price can be changed by any agent until the transaction is in a *Closed Status*. Agents with permission to *Change Transaction Status* can change it during any *Status*.

For offices subscribed to Commission Module, *Sale Price* cannot be changed by an agent once *Commissions* have been entered for a transaction.

Total Commission

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 Status*. Agents with permission to *Change Transaction Status* can change it during any *Status*.

For offices subscribed to Commission Module, *Commission Summary* cannot be changed by an agent once *Commissions* have been entered for a transaction.

In-house Agents & Outside (Co-op) Agents

Agents with permission to *Change Listing / Selling Agents Of Own Transaction* can add or remove agents on their own transactions as long as the transaction is in an *Active* or *Listing Status*. Once a transaction reaches a *Pending Status*, they cannot add or remove agents.

Still have questions? We're here to help! Contact us from within Pipeline by clicking [Help] in the upper right corner, then [Get Help] and select [Contact].