Why Can't I Add a Transaction?

Are you unable to change a certain field on a transaction? For security and administrative reasons, your ability to update certain transaction fields is limited in Pipeline. This guide explains what to do when you need to make a change to a transaction but are unable to do so.

Reason

When you are not able to update a certain field on a transaction, Pipeline is doing its job and limiting what you are allowed to change based on permissions granted by your admin and general security rules set by the system.

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, learn more here →