

Pipeline AI Update

A counter-offer lands, the terms change, and you never retype a field — AI Update reads the new document, shows you what moved and where, and you decide what to apply.

Introduction

Deals move. A counter-offer shifts the price, an addendum slides the closing date, a contingency removal clears a clause, and each one arrives as another PDF with the new terms somewhere inside it. With [Pipeline AI](#), AI Update reads that document against the transaction you already have. It opens the transaction form with every value it changed marked in blue and the source text one click away, and you can switch any value back before you save.

Coordinators run it when new paper lands on a deal that's already open. It earns its place on long documents. On a builder contract with terms spread over forty pages, finding what moved is most of the work, and that's the part you hand over. On a one-line price drop you already know about, editing the field yourself is faster.

How It Works

Adding the Doc Changes Nothing

Adding a PDF to a transaction puts it in the doc list, and that's all. Nothing on the transaction changes until you run *AI Update* on that doc and save the result, so you can add docs as soon as they arrive.

Blue Marks What Changed

The review opens on the whole transaction form, with every value Pipeline filled in marked in blue. Click a blue field's document icon to see the text it came from. A changed field also carries a toggle that switches between its previous value and the new one, and saving writes whichever value each field is showing.

Dates Are Calculated

When a document writes a deadline as a rule, like "inspection 10 days from acceptance", Pipeline turns it into a calendar date and counts your company's business holidays. Hover over a date's document icon to see the page, the text Pipeline read, and how it reached the date.

What AI Update Changes and What It Leaves Alone

- **The fields the document restates:** any value the new document changes, unless you toggle it back. On a counter-offer or addendum, the usual movers are sale price, contract dates, earnest money, financing type and buying-side contacts.
- **Anything the document doesn't mention:** holds. If a counter-offer moves only the price, the closing date stays where it was.

Update a Transaction From a New Document

Reads a later document against the transaction and opens a review of what changed.

Who Can Do This: Anyone with access to the transaction and its docs, once a master admin has turned on Pipeline AI and your role is included for *AI Update*.

To update a transaction from a new document:

- 1 Click [Transactions] in the top menu, then open the transaction you want to update.
- 2 Add the new PDF to the transaction by dragging it onto the doc list or clicking [Add Doc].
- 3 Hover over the new doc's row.
- 4 Click the sparkle icon when it turns blue.

Pipeline reads in the background, usually for about a minute. A green flag on the doc shows when the review is ready.

Review and Save Your AI Update Result

Takes you from a ready result to an updated transaction.

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

To review and save your AI Update result:

- 1 Click the green flag on the doc in the transaction's doc list.
- 2 Step through the blue fields with the arrows at the top.

- 3 Click a field's toggle to keep the value it held before.
- 4 Change the status yourself if the document calls for it.
- 5 Click [Save Transaction].

You land back on the transaction with the values you kept written in and the new doc filed in its doc list.

Check What a Saved Update Changed

Once it's saved, an update is an ordinary set of edits on the transaction. That's where the question gets settled a week later, when somebody asks who moved the closing date.

See [Search A Transaction's Activity History](#).

Frequently Asked Questions

Where is the button to run AI Update?

On the doc's row, not in its gear menu. Hover over the doc on the transaction and click the sparkle icon when it turns blue.

Does AI Update change my transaction's status?

No. The status is always yours to set.

Can I run AI Update more than once on the same transaction?

Yes. Run it for each new document the deal brings.
