What's New (July 26, 2026)

Control Who Can Run Pipeline AI

You asked, and we listened. This was the top request we heard after Pipeline AI launched.

Now, you can decide who at your office is able to run each Pipeline AI action. By default, everyone keeps the access they already have — so nothing changes for your team unless you want it to — and you can tighten who has access whenever you like.

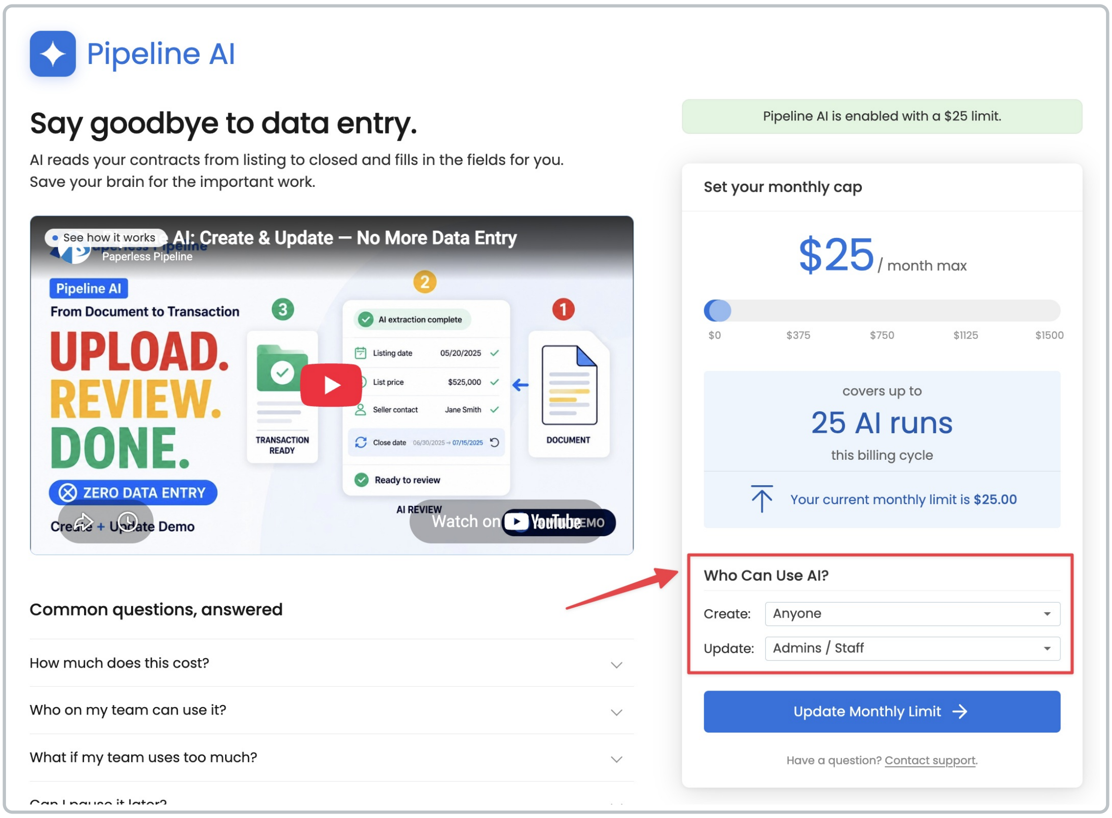
Set access for **Create** and **Update** separately, each with three choices:

- **Anyone** (the default): anyone whose regular permissions already allow it — for Create, anyone who can create transactions; for Update, anyone with access to the transaction and its docs.
- **Admins / Staff**: Master Admins and admins with *View All* permission.
- **Master Admins**: Master Admins only.

Master Admins always have access to both. Because Create and Update are set independently, you can open up one without opening up the other.

How to set who can use AI:

1. Open the Pipeline AI management page.
2. Below the monthly limit slider, find the **Who Can Use AI?** section.
3. For **Create** and **Update**, choose who can use it — Anyone, Admins / Staff, or Master Admins.



Pro tip: Want to keep a lid on spend? Restrict an action to admins and pair it with your monthly limit. You control both who can run AI and the most it can ever cost in a single billing month.

Learn more about Pipeline AI.

Count From a Date, No More Calculating Days by Hand

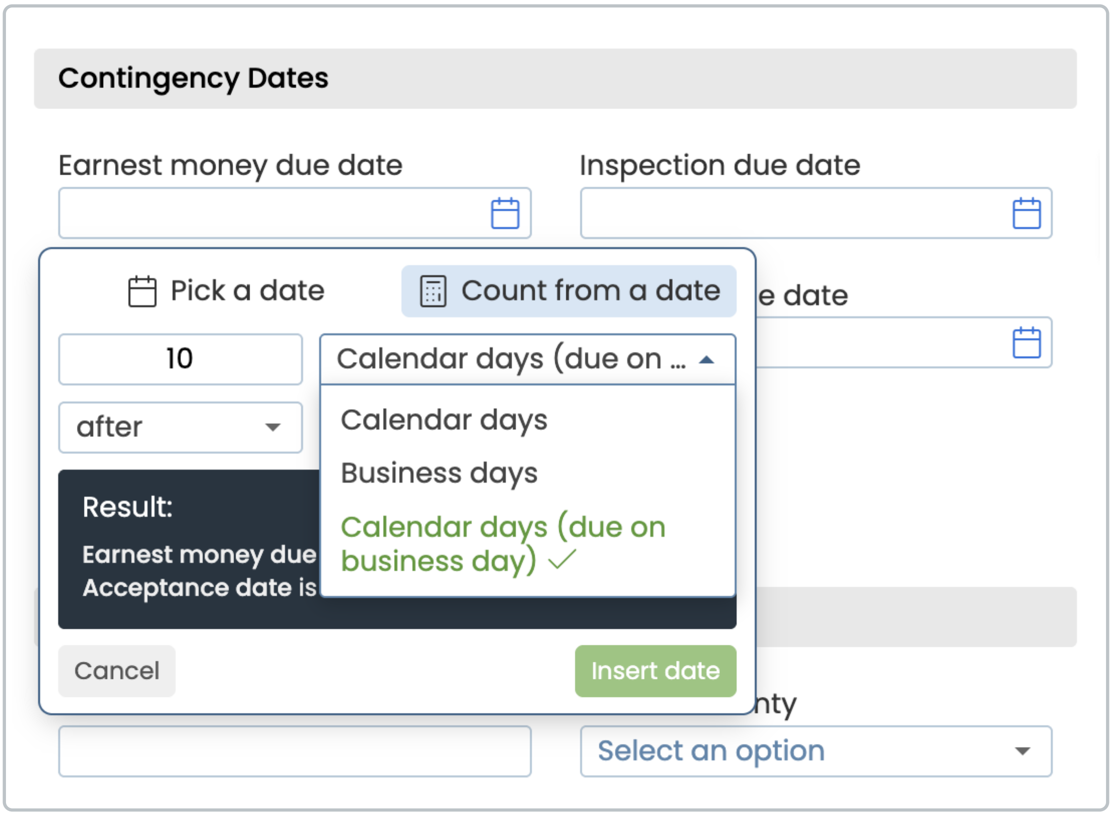
So much of a transaction's timeline counts on another date — a contingency a set number of days after the acceptance date, an expiration a set number of days after the listing date, a disclosure deadline that has to land on a business day. Until now, you manually worked those out on a calendar.

Now, you don't have to. When you click into a date field on a transaction, choose **Count from a date**, pick the date to count from — like your acceptance or listing date — enter the number of days, and Pipeline calculates the date and drops it in.

It can count by calendar days, business days, or calendar days falling on a business day — using the Business Holidays set in your account. So, a 10-calendar-day contingency from acceptance or a 7-business-day disclosure window lands on exactly the right day, every time, without anyone counting or double-checking.

How to use it:

1. When adding or editing a transaction, click into any date field.
2. Click [Count from a date].
3. Pick the date to count from, like your acceptance or listing date, and the number of days, then insert the result and let Pipeline do the work.

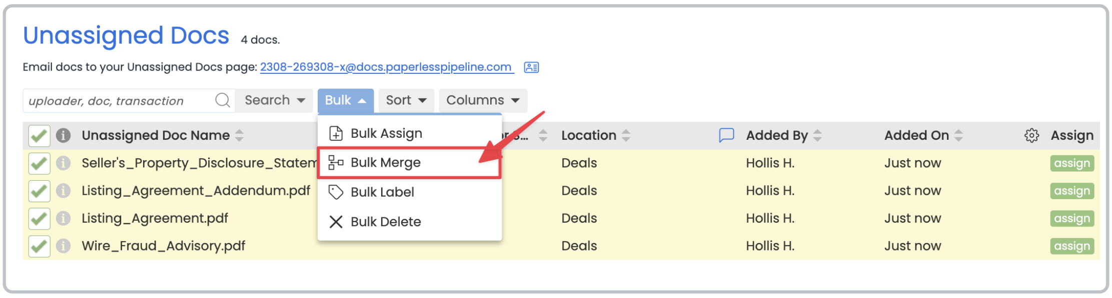


Merge Documents Right on the Unassigned Docs Page

You can now merge documents straight from Unassigned Docs to combine related pages into a single file before you assign them, with no back-and-forth.

How to merge:

1. Open your **Unassigned Docs** page.
2. Check the boxes next to the documents you want to combine.
3. Click [Bulk] then [Bulk Merge].



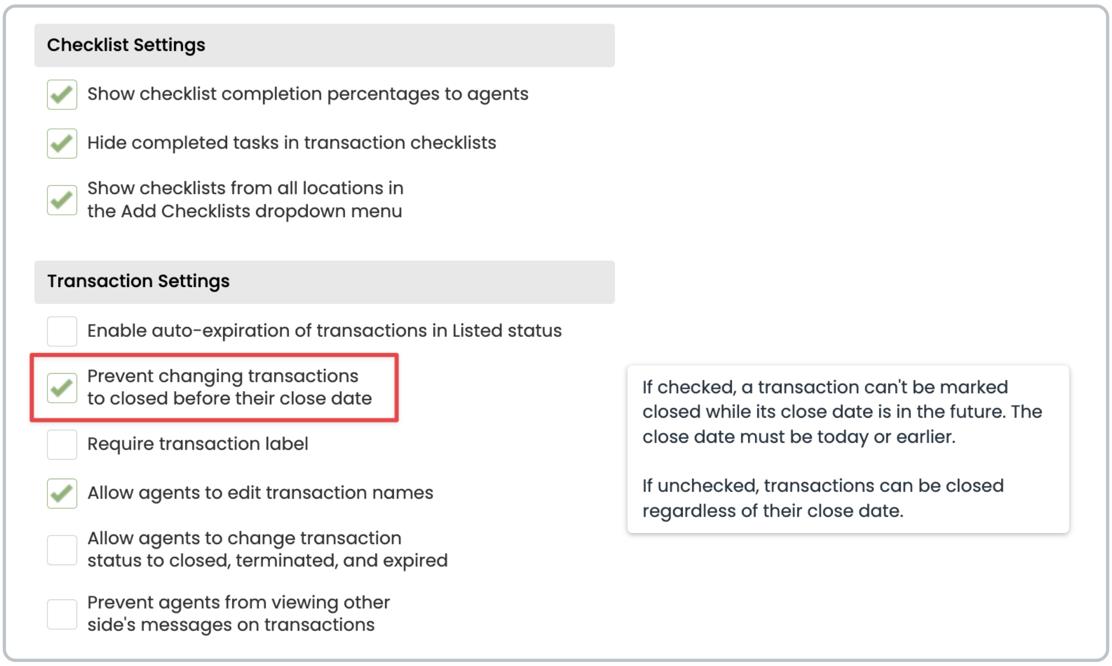
Prevent Closing Before the Close Date

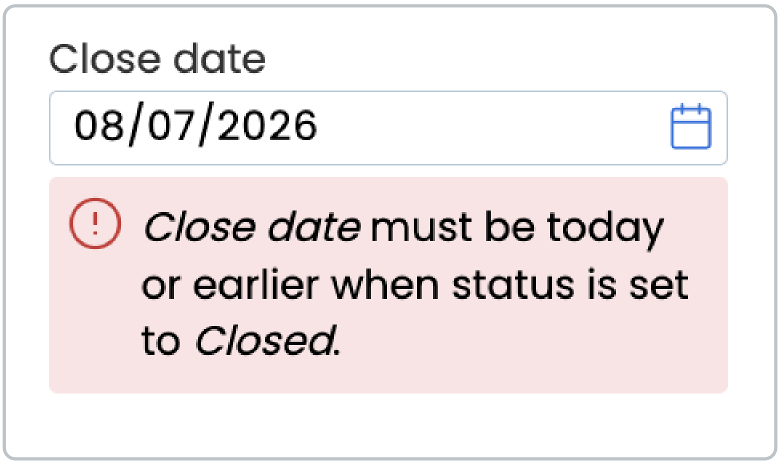
A new company setting lets you stop a transaction from being marked *Closed* while its *Close Date* is still in the future, so a deal can't be closed out early by mistake.

It's off by default. Once it's turned on, the *Close Date* must be today or earlier before a transaction can be moved to *Closed* status.

How to turn it on:

1. Go to your **Admin / Settings**.
2. Scroll to the *Transaction Settings* section.
3. Check the box next to *Prevent changing transactions to closed before their close date*, and save.





More Room to Work

We've widened the app so more of your work fits on screen at once: wider transaction lists, more room in your columns, and less side-to-side scrolling. It's most noticeable on larger monitors, and there's nothing to set up. You'll see the extra space the next time you log in.

Snappier Performance, Especially for Larger Accounts

You should notice snappier performance across the site. We've been tuning things behind the scenes, and if you keep a lot of transactions and documents in Pipeline, the pages that used to feel slow should load noticeably faster.