Why Can't I Update a Transaction Field?

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When a transaction field won't let you make a change, Pipeline is doing its job — limiting edits by your permissions and a few built-in security rules. Here's how to find the reason and fix it.

You're an Agent, and the Field Is Admin-Only

A few fields belong to admins no matter what, because changing them affects the whole record. Agents can't edit:

- Transaction Name or Property Address
- MLS or Transaction Number
- Transaction Label
- Total Commission
- Location (this one is master-admin only)

Fix: Ask an admin on your account to make the change for you. If you're the admin and it's the Location that's stuck, the master admin has to update it.

You Don't Have the "Change Transaction Status" Permission

A whole group of fields is gated behind the "Change transaction status" permission — the status itself, plus the dates that move with it:

- Listing Date, Expiration Date, Acceptance Date, and Close Date
- Optional and contingency dates
- Optional fields

Fix: Ask an admin to turn on "Change transaction status" for you. An admin sets it per location under [Manage Users] → edit the user → Permissions.

The Transaction Is Closed

Once a transaction moves into a Closed status, several fields lock down to protect the finished record. After close, only an agent who *both* created the transaction and holds the "Change transaction status" permission can change More Info, Buyer and Seller Name and Lead Source, List Price, Sale Price, and Commission Summary.

Fix: Ask an admin to make the edit, or have the agent who created the transaction (with status permission) update it.

Commissions Have Been Entered

For offices on the Commission Module, generating a Commission Disbursement Authorization (CDA) locks the numbers behind it. Once commissions are entered or a CDA is generated, the Buyer, Sale Price, and Commission

Summary lock.

Fix: Re-generate the CDA to update the Buyer Name or Sale Price. If you're not sure how, an admin on your account can help.

You're Trying to Change Agents on the Transaction

Agents with the "Change Listing / Selling Agents of Own Transaction" permission can add or remove agents on their own transactions — but only while the transaction is in an Active or Listing status. Once it reaches Pending, that option goes away.

Fix: Ask an admin to adjust the agents, since they can make the change after a transaction is Pending.

Learn More

Build your own transaction fields to capture the data Pipeline doesn't already track.

Build the fields your office needs, and Pipeline treats them like every other transaction detail.

See Custom Fields

Still Have Questions?

Still stuck after checking the above? Email us at help@paperlesspipeline.com, tell us which field and what you're seeing, and we'll help.