Why Can't an Agent Update a Transaction Field?

Last Modified on 09/04/2026 11:16 am EDT

When an agent can't change a certain field on a transaction, Pipeline is doing its job — limiting edits by the agent's permissions and by built-in rules that protect a transaction as it moves forward.

What's Happening

Once a transaction exists, Pipeline controls which fields an agent can edit based on two things: the permissions their admin granted, and general security rules Pipeline applies to every account. Some fields are admin-only, some open up with the *Change transaction status* permission, and some lock down after a transaction closes or once commissions are entered.

> Quick fixes: if you're an **agent**, ask your admin to make the change for you. If you're an**admin**, check the field below to see what's required — and confirm the agent has the needed permission in Transaction Permissions.

Admin-Only Fields

Only admins can change these fields — an agent can't edit them regardless of their other permissions:

- **Transaction Name or Property Address**— admins only.
- **MLS or Transaction Number** — admins only.
- **Transaction Label** — admins only.
- **Total Commission** — admins only.
- **Location** — master admin only.

Editing the Transaction Name or MLS Number on an existing transaction requires the admin-level *View all transactions for this location* permission, so a returning or newly added agent may need that turned on. An agent can also email an admin from within the transaction to request the change.

Fields That Need the "Change Transaction Status" Permission

These open up for agents once they hold *Change transaction status*:

- **Status** — agents with the permission can set Active, Listing, Pending, and Other statuses. They can also set Closed or Fell-Through statuses when the company-wide setting for that is turned on.
- **Listing Date, Expiration Date, Acceptance Date, Close Date**— all require the permission. The agent who created a transaction can change the Listing Date while it's in a listing status.
- **Optional Dates / Contingency Dates** and **Optional Fields** — require the permission.

Fields Any Agent on the Transaction Can Edit

- **Custom Fields** — editable by any agent on the transaction.
- **More Info** — editable by any agent until the transaction closes. After that, only the agent who created it and holds *Change transaction status* can change it.

Fields That Lock Down After a Transaction Closes

Several fields are open while a transaction is in progress but lock once it reaches a closed status — after that, only an agent who both created the transaction and has *Change transaction status* can edit them:

- **Buyer Name & Lead Source** and **Seller Name & Lead Source**
- **List Price**, **Sale Price**, and **Commission Summary** — any agent can edit these before close; an agent with the status permission can edit them at any status.

Commission Module and Agent Changes

For offices on the Commission Module, some fields lock as soon as commissions are entered or a CDA is generated:

- **Buyer** and **Commission Summary** lock once commissions are entered.
- **Sale Price** locks once a Commission Disbursement Authorization (CDA) is generated. To update the Buyer Name or Sale Price after that, regenerate the CDA.

A Few Special Cases

- **Admin Info** is visible to admins only — agents never see it and never change it.
- **In-house and Outside (Co-op) Agents** — an agent with *Change listing / selling agents of own transaction* can add or remove agents on their own transactions while active or in a listing status. Once the transaction is pending, they can't.

Still Can't Make the Change?

If the agent has the right permission and the transaction isn't closed or commission-locked but the field still won't update, contact us with the agent's login email and the transaction name, and mention which field, so we can look at the specific setup.

Learn More

Permissions decide what someone can do to a transaction: create it, edit its fields, change its status, or delete it. You set them per user, per location.

See Transaction Permissions

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.