

Why Didn't a Value Update From My New Document?

Last Modified on 09/04/2026 11:19 am EDT

You ran *AI Update* on a new document and a value you expected to move came back the same. Work through these in order — the cause is usually one of four things, and the last one is just a manual edit.

The Run Never Started

Attaching a document to a transaction files it and does nothing else. *AI Update* runs only when you start it from the document itself — and the control that starts it appears only on hover, so it's easy to believe there isn't one.

To start the run:

1. Open the transaction and find the new document in its doc list.
2. Hover over the document, then hover the folder icon in the column just to its right.
3. Click the icon when it turns blue.

Watch for your field in the summary of changes when the result comes back.

The Document Doesn't Restate the Value

AI Update surfaces only what the new document actually changes. If the document doesn't state the value — or states it in a way that doesn't read as a change — there's nothing for Pipeline to move, and the field holds.

Open the document and confirm the new value is written in it. Short forms and single-purpose addenda often carry far less than people expect: a form that only records an acknowledgement has no terms in it to pull. When the value isn't in the document, edit the field on the transaction by hand.

The Field Was Rewound Before the Update Was Applied

Rewinding a field on the review screen keeps its prior value on purpose, and that field then stays put when the rest of the update goes through. If the field turned up in the summary of changes but didn't take, this is usually why.

Run the update again on the same document and leave that field alone this time — or edit it on the transaction by hand, which reaches the same place faster.

The Status Didn't Change

This one isn't a fault. *AI Update* writes fields and never moves the transaction's status, so a cancellation form, a closing document, or a termination won't change where the transaction sits in your pipeline.

Set the status yourself on the transaction once the change reads right. Every office runs statuses its own way, which is why this stays a person's call.

Still Stuck?

If the value is plainly written in the document and still isn't coming through, send us the transaction name, the document, and the field. That's the fastest way for us to see what the read is missing — and it's what makes the next read better.

Learn More

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.

See [Pipeline AI Update](#)

Still Have Questions?

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