Pipeline AI Update

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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. Each one arrives as another PDF with the new terms buried somewhere inside it, and the risk isn't the document. It's the field on the transaction nobody noticed had changed.

AI Update reads a new document against the transaction you already have and opens a review of what's different, field by field, with the source text shown beside each one. It's built around a suspicion rather than a promise. A machine reading a contract can be wrong, so the review shows you only what moved, tells you where it read it, and lets you put any single value back before anything is written. Filing a document on a transaction still changes nothing on its own.

On a long builder contract with terms scattered across forty pages, finding what moved is most of the work, and it's the part you hand over. On a one-line price drop you already know about, editing the field yourself is faster. That's a fair call to make document by document rather than a policy to set.

How It Works

You put the new document on the transaction and start *AI Update* from it. Pipeline reads the document against the transaction's current values and opens a review of every field that changed.

Attaching the Document Changes Nothing

Dragging a PDF onto a transaction files it, and that's all it does. A value moves only when you run *AI Update* on that document and apply the result — so there's no risk in getting documents onto the file as they arrive.

Start It From the Doc's Folder Icon

Open the transaction, hover the document in its doc list, then hover the folder icon in the column to its right and click when it turns blue. The icon only appears on hover, which is the single most common reason people can't find it.

Only the Changed Fields Come Up

The read runs in the background, usually about a minute, and opens to just the fields that moved — everything untouched stays collapsed out of the way. Arrows at the top walk you through the changes in order, and the source text highlights in the PDF beside each one.

You Decide Field by Field

Each changed field carries a rewind control. Hover it to see the previous value; click it to put that value back. Applying the update writes only the changes you didn't rewind — so you can take most of a counter-offer while declining the one term you've already settled elsewhere.

Pipeline Calculates the Dates and Leaves the Status Alone

When a document writes a deadline as a rule — "inspection 10 days from acceptance" — Pipeline turns it into a real calendar date and accounts for your company's business holidays. What it doesn't touch is the status: that stays yours to move once the change reads right, even when the document is a cancellation or a closing.

What AI Update Changes and What It Leaves Alone

- **The fields the document restates**: any value the new document changes that you don't rewind. On a counter-offer or addendum, the usual movers are sale price, contract dates, earnest money, financing type, and buying-side contacts.
- **Deadlines written as day-rules**: calculated to a real calendar date, with your business holidays counted.
- **Anything you rewind**: rewinding a field keeps its prior value, and that field stays exactly as it was.
- **Anything the document doesn't mention**: if a counter-offer moves only the price, the closing date and everything else hold.
- **The transaction's status**: never moved by *AI Update*. Always yours to set.

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 documents, once a master admin has enabled Pipeline AI for the account. Until it's enabled, the folder icon does nothing.

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 — drag it onto the doc list, or click [Add Doc].
3. Hover over the new document, then hover the folder icon in the column to its right.
4. Click the icon when it turns blue.
5. Leave it to read. The run happens in the background, usually about a minute — Pipeline lets you know when your summary of changes is ready.

When it's ready, open and review it — see *Review and Apply Your AI Update Result* below.

Review and Apply Your AI Update Result

> Takes you from the summary of changes to an updated transaction.

> **Who Can Do This**: Anyone who can run an *AI Update*. The notice goes to the person who started the run.

To review and apply your AI Update result:

1. Open it from the notification, or open the document showing a green folder with a checkmark — it opens straight to the summary of changes.
2. Use the arrows at the top to step through each changed field. The source text highlights in the PDF as you go.
3. To keep a value as it was, hover its rewind control to see the previous value, then click to put it back.
4. Click [Apply Updates].

You land back on the transaction with the changes you kept written in, the new document filed in its doc list, and the status right where you left it.

Keep a Value the Document Would Have Changed

> Protects one field while the rest of the update goes through.

> **Who Can Do This**: Anyone reviewing an *AI Update* result, before it's applied.

To keep a value the document would have changed:

1. Find the field in the summary of changes.
2. Hover its rewind control to see the value it held before.
3. Click the rewind control to put that value back.
4. Click [Apply Updates] when you've been through the rest.

That field holds its original value while every change you didn't rewind is written in. If you've already applied the update, edit the field on the transaction by hand to set it back.

Check What an Applied Update Wrote

The review screen is your last look before the values land. Once they have, an applied update stops being an AI thing and becomes an ordinary set of edits on the transaction — which is where the question gets settled a week later, when somebody asks who moved the closing date.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

Pipeline AI Update FAQ

AI Update reads a later document and surfaces only the fields it changes. Answers to the common questions about counter-offers and addenda, running it more than once, and what it never touches.

See AI Update FAQ

Pipeline AI Update Troubleshooting

Update not doing what you expected? Start here.

- Why Didn't a Value Update From My New Document?
- Why Did a Field Change That I Didn't Want Changed?