Pipeline AI Update FAQ

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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.

Can I use AI on a transaction that already exists?

Yes — that's exactly what AI Update is for. *AI Create* starts a new transaction from a document; *AI Update* reads a document against a transaction you already have. Add the new document to the transaction, then start the run from the document's folder icon.

Where is the button to run AI Update?

On the document itself, in the folder column — and only on hover. Open the transaction, hover the document in its doc list, then hover the folder icon just to the right of it and click when it turns blue. It isn't visible until you hover, which is why it's easy to miss the first time.

What does AI Update change, and what does it leave alone?

Only the fields the new document actually changes. It reads the document against your current values and brings up what moved — typically sale price, contract dates, earnest money, financing, and buying-side contacts. Anything the document doesn't restate stays exactly as it was.

Does uploading the document update the transaction on its own?

No. Attaching a document just files it on the transaction. *AI Update* runs only when you start it from the document's folder icon, and nothing is written until you apply the result.

How do I keep a value it changed?

Rewind it before you apply. Each changed field has a rewind control on the review screen — hover to see the previous value, click to restore it, and that field holds while the rest go through. Already applied? Edit the field on the transaction by hand.

Does AI Update change my transaction's status?

No — the status is always yours. Pipeline writes the fields you applied and stops there, so a cancellation form or a closing document won't move the transaction on its own. Set the status yourself once the change reads right.

Does it handle counter-offers and addenda?

Yes — that's the everyday case. Counter-offers, addenda, and contingency removals are what *AI Update* is built around, and there's no setup for a particular form or state. Review the summary of changes before you apply, the same as you would any other result.

Can I run AI Update more than once on the same transaction?

Yes, as many times as the deal needs. A counter, then an addendum, then revised terms — each new document is its own update. Add it, run it, review, apply, and repeat as the deal moves.

What about contingency dates?

Pipeline calculates them for you. When a document writes a contingency as a rule — "inspection 10 days from acceptance" — you get the actual calendar date, with your company's business holidays counted. Check the dates on the review screen before you apply; they carry into your checklists and reminders.

Troubleshooting

Running into something? These walk through the common snags.

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

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.