AI Update

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Review the changes AI Update pulled from a counteroffer or addendum, then save the ones you want.

Introduction

AI Update is the part of Pipeline AI that keeps a transaction current when the terms change, so you don't have to find what changed yourself. When someone picks a counteroffer or addendum on a transaction, it reads the document against the transaction and updates the *Edit Transaction* form with what changed, like a lower price or a later closing date.

When you open the review, the form already shows what changed. Every value Pipeline changed is marked, and the text it came from is one click away. Switch any change back, and save the ones you want.

Your transaction stays as it is until you save it.

How It Works

Pipeline Finds the Changes, You Decide What Stays

AI Update helps you update.

- **Pipeline** reads the new document against the transaction, updates the *Edit Transaction* form with every value the document changes, and marks each one.
- **You** review each change, switch back any you don't want, and save the transaction.

Adding the Doc Changes Nothing

Adding a PDF to a transaction puts it in the doc list, and that's all. Nothing on the transaction changes until you run AI Update on that doc and save the result, so you can add docs as soon as they arrive.

Changes Appear in Blue

The review opens on the whole transaction form, with every value Pipeline filled in marked in blue. Each blue field's document icon shows the text the value came from. A changed field also has a toggle that switches between its previous value and the new one, and saving writes whichever value each field is showing. Sections with no changes fold away, so you can easily see what moved.

Dates Are Calculated

When a document writes a deadline as a rule, like "inspection 10 days from acceptance," Pipeline turns it into a calendar date and counts your company's business holidays. A date's document icon shows the page, the text Pipeline read, and how it reached the date. The dates it fills in, including your custom date fields, set the due dates of any tasks tied to them.

What AI Update Changes and What It Leaves Alone

- **The fields the document restates**: any value the new document changes, unless you switch it back. On a counteroffer or addendum, the usual movers are the sale price, the contract dates and the notes in More info.
- **Anything the document doesn't mention**: holds. If a counteroffer moves only the price, the closing date stays where it was.

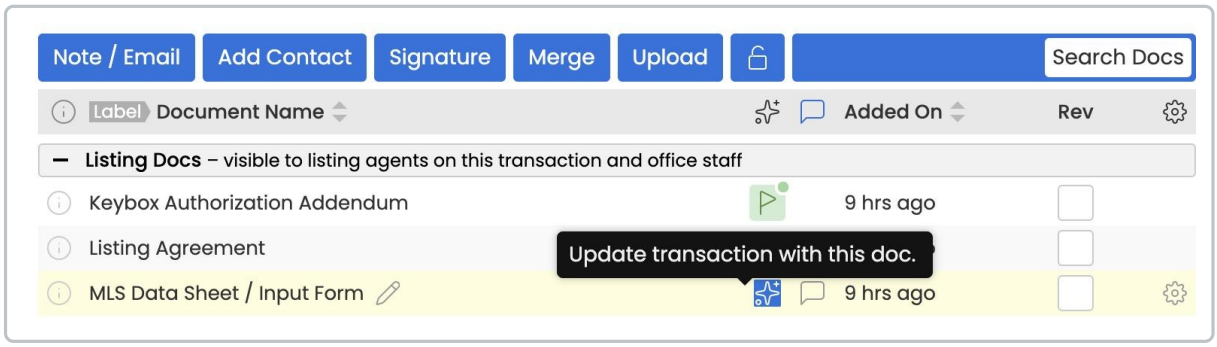
Update a Transaction From a New Document

Add the new paperwork to the deal and let Pipeline read it against the transaction.

Who Can Do This: Admins / Staff. When Update is set to Anyone, also anyone who can edit the transaction without Pipeline AI.

To update a transaction from a new document:

1. Click **[Transactions]** in the top menu, then open the transaction you want to update.
2. Click **[Upload]** above the doc list, and add the new PDF.
3. Hover over the new doc's row, and click the sparkle icon that appears.
4. Click **[Update transaction]**.



A spinner shows on the doc while Pipeline reads, usually from a few seconds to about a minute. A green flag replaces it when the update is ready to review.

Review the Changes and Save the Transaction

Review each change Pipeline found, keep the ones that are right, and save.

Who Can Do This: Anyone who can use AI Update.

To review the changes and save the transaction:

1. Click the green flag on the doc in the transaction's doc list.

   You can also click **[click here to review]** in the message at the top of the transaction.

2. Review each blue field against the document on the right.

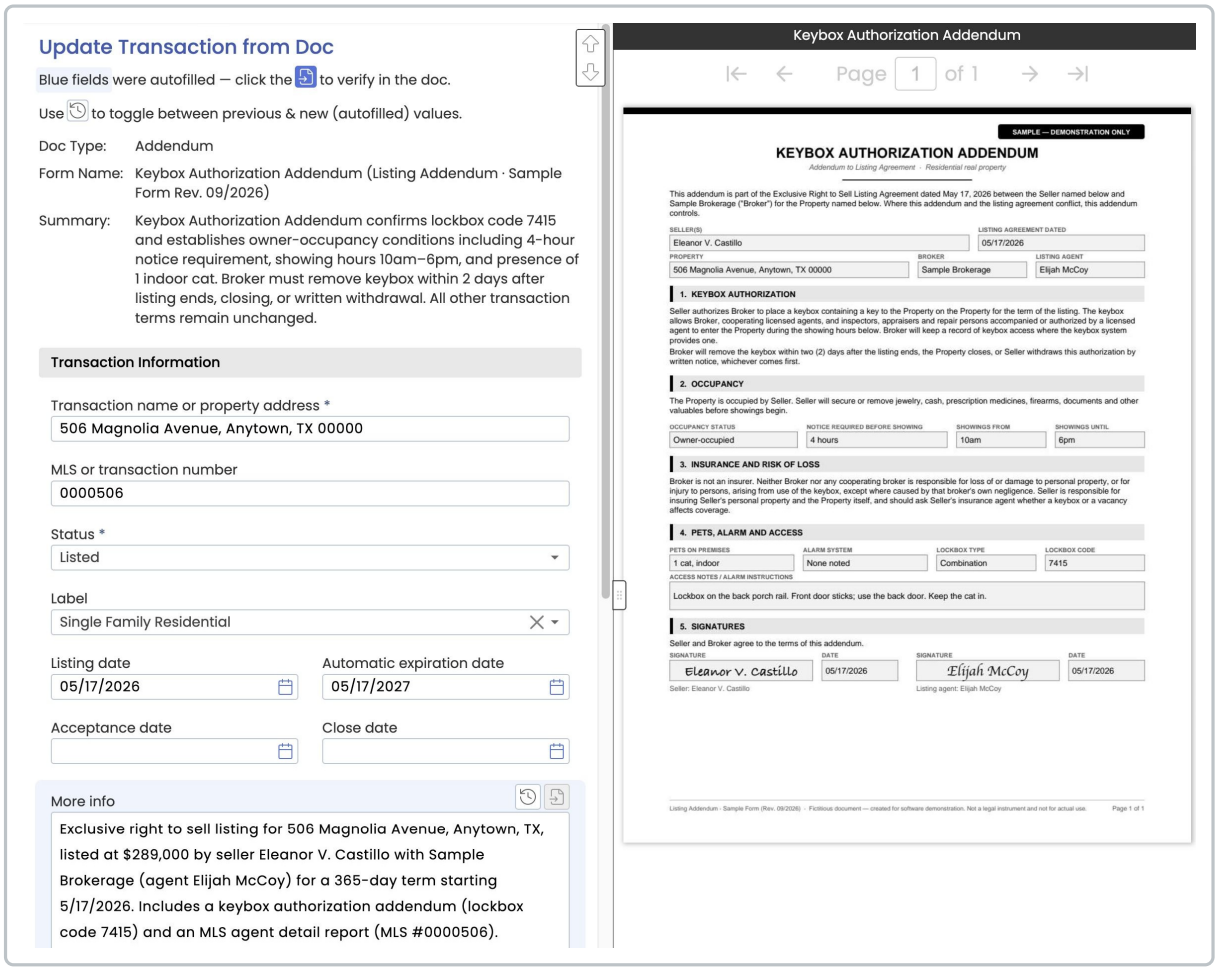
   Click a field's document icon to see where its value came from, or use the up and down arrows at the top to step through the changed fields.

3 To keep a field's old value, click its toggle.

   The toggle switches between the previous value and the new one, and the field keeps whichever it shows when you save.

4 Change the status yourself if the document calls for it. Pipeline never changes it.

5 Click **[Save Transaction]**.



You land back on the transaction with the values you kept written in. Until you click [Save Transaction], nothing on the transaction changes, and the update waits on the doc with its green flag.

More Topics

Start the Transaction First

AI Update needs a transaction to update. When the deal isn't in Pipeline yet, start it from the contract with AI Create.

Review the *Add Transaction* form AI Create fills in from a contract, then add the transaction.

See AI Create

Review What a Saved Update Changed

Once it's saved, an update is an ordinary set of edits on the transaction. That's 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

Choose Who Can Use AI Update

Who can use AI Update is its own setting, the Update row on the Pipeline AI page.

Choose who can use Pipeline AI, and limit what it costs once your monthly credit is used.

See Pipeline AI Settings

Frequently Asked Questions

Does AI Update change my transaction by itself?

No. AI Update helps you update. It fills in what the document changed for you to review, and nothing on the transaction changes until someone clicks Save Transaction.

Can I use Pipeline AI on a transaction I already have?

Yes, that's AI Update. Add the new document to the transaction, then click the sparkle icon on its row.

Does AI Update change my transaction's status?

No. The status is always yours to set.

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

Yes. Run it for each new document the deal brings.

Does AI Update use our Pipeline AI credit?

Yes. Every update uses the month's credit first. Past the credit, each update is $0.50, up to your monthly spending limit.