

AI Update

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Review the changes AI Update pulled from a counteroffer or addendum and apply the ones you want.

Introduction

Pipeline AI helps you update a transaction when new paperwork comes in. Deals change: a new price, a later closing date, a contingency cleared, and each one arrives as another PDF with the new terms somewhere inside it. Pipeline reads that document against the existing transaction and fills in what changed. Each update draws on your plan's monthly credit.

When you open the review, every value Pipeline changed is marked, and the text it came from is one click away. You can switch any change back to the value it had before, so only the changes you keep go on the transaction.

Nothing on the transaction changes on its own. Someone on your team checks each change and saves the transaction when it's right.

How It Works

Pipeline Finds the Changes, You Decide What Stays

AI Update helps you update. It does the reading, and you make the call.

- **Pipeline** reads the new document against the transaction, fills in every value the document changes, and marks each one.
- **You** check 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.

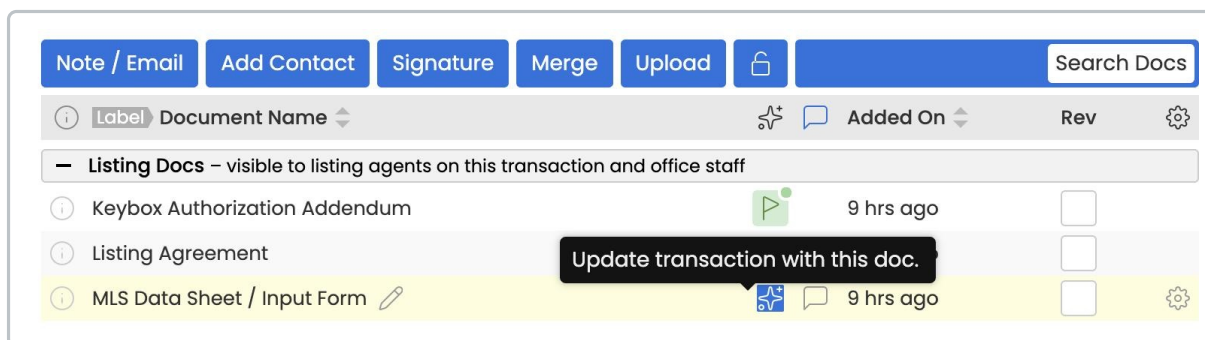
Update a Transaction From a New Document

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

Check 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 Check 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]**.

Update Transaction from Doc

Blue fields were autofilled — click the  to verify in the doc.

Use  to toggle between previous & new (autofilled) values.

Doc Type: Addendum

Form Name: Keybox Authorization Addendum (Listing Addendum · Sample Form Rev. 09/2026)

Summary: Keybox Authorization Addendum confirms lockbox code 7415 and establishes owner-occupancy conditions including 4-hour notice requirement, showing hours 10am–6pm, and presence of 1 indoor cat. Broker must remove keybox within 2 days after listing ends, closing, or written withdrawal. All other transaction terms remain unchanged.

Transaction Information

Transaction name or property address *

506 Magnolia Avenue, Anytown, TX 00000

MLS or transaction number

0000506

Status *

Listed

Label

Single Family Residential

Listing date

05/17/2026

Automatic expiration date

05/17/2027

Acceptance date

Close date

More info

Exclusive right to sell listing for 506 Magnolia Avenue, Anytown, TX, listed at \$289,000 by seller Eleanor V. Castillo with Sample Brokerage (agent Elijah McCoy) for a 365-day term starting 5/17/2026. Includes a keybox authorization addendum (lockbox code 7415) and an MLS agent detail report (MLS #0000506).

Keybox Authorization Addendum

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KEYBOX AUTHORIZATION ADDENDUM

Addendum to Listing Agreement - Residential real property

This addendum is part of the Exclusive Right to Sell Listing Agreement dated May 17, 2026 between the Seller named below and Sample Brokerage ("Broker") for the Property named below. Where this addendum and the listing agreement conflict, this addendum controls.

SELLER(S) LISTING AGREEMENT DATED

PROPERTY BROKER LISTING AGENT

1. KEYBOX AUTHORIZATION

Seller authorizes Broker to place a keybox containing a key to the Property on the Property for the term of the listing. The keybox allows Broker, cooperating licensed agents, and inspectors, appraisers and repair persons accompanied or authorized by a licensed agent to enter the Property during the showing hours below. Broker will keep a record of keybox access where the keybox system provides one.

Broker will remove the keybox within two (2) days after the listing ends, the Property closes, or Seller withdraws this authorization by written notice, whichever comes first.

2. OCCUPANCY

The Property is occupied by Seller. Seller will secure or remove jewelry, cash, prescription medicines, firearms, documents and other valuables before showings begin.

OCCUPANCY STATUS NOTICE REQUIRED BEFORE SHOWING SHOWINGS FROM SHOWINGS UNTIL

3. INSURANCE AND RISK OF LOSS

Broker is not an insurer. Neither Broker nor any cooperating broker is responsible for loss of or damage to personal property, or for injury to persons, arising from use of the keybox, except where caused by that broker's own negligence. Seller is responsible for insuring Seller's personal property and the Property itself, and should ask Seller's insurance agent whether a keybox or a vacancy affects coverage.

4. PETS, ALARM AND ACCESS

PETS ON PREMISES ALARM SYSTEM LOCKBOX TYPE LOCKBOX CODE

ACCESS NOTES / ALARM INSTRUCTIONS

Lockbox on the back porch rail. Front door sticks; use the back door. Keep the cat in.

5. SIGNATURES

Seller and Broker agree to the terms of this addendum.

SIGNATURE DATE SIGNATURE DATE

Seller: Eleanor V. Castillo Listing agent: Elijah McCoy

Listing Addendum - Sample Form (Rev. 09/2026) - Fictitious document — created for software demonstration. Not a legal instrument and not for actual use. Page 1 of 1

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.

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.

Check the form AI Create fills in from a contract, then save it as a new transaction.

See [AI Create](#)

Check 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 [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 check, 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.

Where is the button to run AI Update?

On the doc's row, not in its gear menu. Hover over the doc on the transaction and click the sparkle icon that appears.

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.

Is AI Update worth running for a small change?

Not always. On a one-line price drop you already know about, editing the field yourself is faster. AI Update earns its place on long documents, where finding what moved is most of the work.

Does AI Update use our Pipeline AI credit?

Yes. Every update uses the month's credit first. Past the credit, updates run only up to your monthly spending limit.

Does AI Update work during a free trial?

On a small credit. A free trial includes a small credit to try AI Create and AI Update.

