# Make Every Closed Deal Match Its Settlement Statement

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Catch a wrong close date at the moment a deal is closed, not weeks later when your books or a file audit turn it up.

## Introduction

A deal closing a few days ahead of its contract date is ordinary. The contract says the 31st, the deal wraps up on the 28th, and after the status changes to Closed, the close date in Pipeline still says the 31st. Nobody means to leave it. It's just the one field no one thinks to touch once the deal is done.

The cost turns up later, somewhere else: an accounting sync that rejects the closing, a closed file that doesn't match its settlement statement, a note back to the office asking them to fix the date and close it again. You end up with every closed deal carrying the day it really closed, checked by the person closing it, at the moment they close it.

## When to Use This

- Your accounting system rejects a closing because its date is in the future, and someone has to fix the transaction and close it again.
- You check closed files against settlement statements, and the close dates in Pipeline don't match.
- Deals keep closing a few days early, and the close date still shows the date from the contract.

## Why Reminding People Doesn't Fix This

The natural first move is to tell everyone to update the close date when they close a deal. It rarely holds, because the mistake happens on a busy day to a deal that feels finished, and nothing on the screen says anything is wrong. A rule that stops the save does what a reminder can't: it asks the question at the exact moment the answer is known.

## 1. Turn On Early Close Prevention

Start with the rule, so the check happens when someone closes the deal instead of when something downstream catches it.

Stop a deal from being marked Closed while its close date is still ahead, so a closed transaction never carries a closing day that hasn't happened yet.

See Early Close Prevention

## 2. Decide Who Can Close a Deal

The fewer people who can move a deal to Closed, the fewer people need the new habit. A company setting decides whether agents can close their own deals or whether closing stays with admins.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

## 3. Close Each Deal From the Settlement Statement

When a deal closes, set the Close Date to the date on the settlement statement in the same edit where you change the status to Closed. If the deal closed early, this is where the date gets corrected.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

## 4. Send Closed Deals On to Your Accounting System

If a Zap posts closed deals to your books, it now only receives close dates that have already happened. Build or check the Zap once the rule is on.

Connect Pipeline to QuickBooks, your CRM, or a spreadsheet, and let a transaction changing status kick off whatever comes next.

See Zapier Integration