Why Can't I Change This Transaction to Closed?

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If Pipeline won't let you set a transaction to Closed and shows "Close date must be today or earlier when status is set to Closed," the transaction's close date is still in the future. Here's why that stops the change and how to get it through.

The Symptom

You edit a transaction, change its status to Closed, and save. The change doesn't go through, and you see the message "Close date must be today or earlier when status is set to Closed."

The Cause

Your company has Early Close Prevention turned on. With that setting on, Pipeline won't close a transaction until its close date is today or earlier. The deal likely closed ahead of schedule, and the close date still shows the original contract date.

The Fix

- **If the deal has closed:** in the same edit, change the Close Date to the day it actually closed, set the status to Closed, and save.
- **If the deal hasn't closed yet:** leave it in its current status and close it once the closing day arrives.
- **If your office needs to close deals ahead of their close date:** ask your master admin whether the setting should stay on.

Learn More

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

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.