Early Close Prevention

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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.

Introduction

A deal set to close on the 31st wraps up on the 28th. Someone changes the status to Closed and moves on, and the close date still says the 31st. Now the record says the deal closed before its own closing day. Nothing inside Pipeline objects. The places that read that record do: an accounting system that won't take a future closing date, or anyone checking the file against the settlement statement.

Early Close Prevention puts the fix in front of the one person who can make it, at the moment they create the problem. With it on, a transaction can't be saved as Closed until its close date is today or earlier, so whoever closes the deal also sets the day it really closed.

How It Works

Your Office Decides Whether It's On

It's a company setting, and it starts off. Some offices mark a deal Closed ahead of its close date on purpose, so Pipeline doesn't block it unless you ask it to. While it's off, a transaction can be closed whatever its close date says.

The Close Date Has to Be Today or Earlier

With the setting on, a transaction moves to Closed only when its close date is today or a day that has already passed. Try to close one with a future date and Pipeline won't save the change. It shows this message instead:

Close date must be today or earlier when status is set to Closed.

Correct the close date and the status saves.

Worth Turning On When Something Downstream Reads the Close Date

If your closed transactions feed an accounting system, a back-office tool, or an automation that runs when a deal closes, a future close date either gets rejected there or gets recorded wrong. The same is true when your office checks closed files against settlement statements. Those are the offices this setting is for.

Turn Early Close Prevention On or Off

Decide for the whole company whether a transaction can be closed before its close date.

Who can do this: Master admins.

To turn Early Close Prevention on or off:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Scroll to the Transaction Settings section.
3. Check the box next to **Prevent changing transactions to closed before their close date** to turn it on, or uncheck it to turn it off.
4. Click [Save Settings].

The setting applies to every transaction in your account.

Close a Deal That Closed Early

Fix the close date and change the status in the same edit.

Who can do this: Anyone who can edit the transaction and change its status.

To close a deal that closed early:

1. Open the transaction.
2. Click [Edit Transaction] from the left menu.
3. Change the **Close Date** to the day the deal actually closed.
4. Change the **Status** to your Closed status.
5. Save your changes.

The transaction is now Closed, and its close date matches the day it closed.

Keep the Close Date Right All Along

The Close Date is one of four dates every transaction carries, and your reports file each deal by it, whether or not this setting is on.

Enter a deal's listing, expiration, acceptance and close dates, and Pipeline counts deadlines and builds reports from them.

See Transaction Dates

Early Close Prevention Troubleshooting

Running into a problem? Start here.

- Why Can't I Change This Transaction to Closed?

Ways to Use Early Close Prevention

See Early Close Prevention at work inside a bigger job:

- Make Every Closed Deal Match Its Settlement Statement
- Send Closed-Deal Commission Data Into QuickBooks