Set Default Value for Transaction Fields

SUMMARY

Learn how to set default values (including placeholder information) to be automatically inserted into the More Info, Admin Info, and Commission Summary fields on all new transactions.

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Introduction

The More Info and Admin Info fields are flexible transaction fields that allow you to track and tag custom information not covered by other transaction fields and features. And the Commission Summary field is useful for storing commission-specific details that will be important to know when managing commissions on a transaction. To encourage agents and admins to enter specific information into these fields, you can set a company-wide default value to be automatically added to each of those fields whenever a new transaction is created. It's especially helpful to include placeholder information (e.g., Home Warranty: Y/N, Lock box number: _____, etc.) to prompt team members to enter the information needed.

Who Can Do This?

Only master admins can set a default value for transaction fields.

Set a Default Value for Transaction Fields

To set a default value for transaction fields:



1) Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].

2 Scroll down to the *Transaction Settings* section.

3 In each field for Pre-filled default values, enter your desired default values for More Info, Admin Info, and Commission Summary (described below).

4 Click [Save Settings].

More Info

The More Info field is ideal for tracking general information not covered by other transaction fields.

To set a default value for More Info:

1 In the box for Pre-filled default value for "More Info" field, enter your desired information to be automatically inserted into the More Info field on transactions.

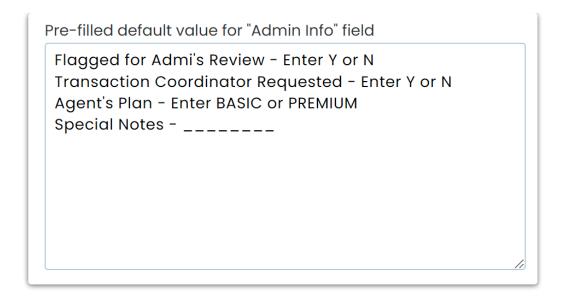
Pre-filled default value for "More Info" field Property URL -FSBO -Lock box - # Year Built -HOA -Home Warranty -Legal Description - _____

Admin Info

The Admin Info field is ideal for tracking information that shouldonly be visible to admins.

To set a default value for Admin Info:

1 In the box for Pre-filled default value for "Admin Info" field, enter your desired information to be automatically inserted into the Admin Info field on transactions.



Commission Summary

The *Commission Summary* field is ideal for storing commission information that will be important to know when managing commissions on a transaction.

To set a default value for Commission Summary:

1 In the box for Pre-filled default value for "Commission Summary" field, enter your desired information to be automatically inserted into the Commission Summary field on transactions.

Pre-filled default value for "Commission Summary" field

Earnest Money Amount - \$ Commission Percent - \$ Broker Commission - \$ Referral Fee - \$

Pipeline Pro Webinar Recording: Effective Ways to Utilize the More Info Field I

This week we'll go over several creative and practical examples of how the *More Info* field can help improve your efficiency in Pipeline. Be sure to pop in!

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