

Custom Fields

Learn how *Custom Fields* work in Paperless Pipeline, including creating, editing, and deleting them.

Introduction

What are Custom Fields?

Custom Fields are additional fields that can be added to transactions, allowing your team to easily monitor specific information that isn't already included in the transaction details.

Custom Fields allow you to efficiently gather and track custom data that helps your team drive transactions to completion, including custom date, list, and text fields.

How They Work

When a *Custom Field* is added, it will be:

- A permanent, editable field on each transaction
- Displayed on *Coversheets*
- Available as an *Autofill Tag*
- Included in downloaded *Transaction Spreadsheet Reports*

Any custom date-type fields turned on will also be:

- Added as a *Relative Trigger Dates for Tasks and Scheduled Messages*. [Learn more about Adding Relative Due Dates →](#)
- Available to be synced to your calendar. [Learn how to sync key dates to calendars →](#)

The screenshot shows the 'Checklists' section on the left with a list of items under 'Checklist 08 PURCHASE: Required'. On the right, there's a form for 'Other information' with fields for 'Lockbox Code', 'City' (Ponte Vedra), 'Transaction Coordinator' (Jim, Jenny, Jorge), and 'Entry Instructions' (Enter through Gate: #1456). A red box highlights the 'Other information' section.

Custom Fields when editing a transaction

The screenshot shows a 'Coversheet for 9144 South Tanglewood Street'. Under 'Transaction Info', there are fields for 'Label: Residential', 'Status: Active', 'Side: Listing', 'MLS #: 502835090', 'Listed On: June 28, 2023', 'List Price: \$150,000', and 'Sale Price: \$157,000'. A red box highlights the 'Sellers Disclosure Due: Jul 5, 2023' and 'City: Ponte Vedra' fields.

Custom Fields on Coversheets

Best Practices

For optimal use of *Custom Fields*, follow these guidelines:

- **Avoid unneeded clutter:** Only gather necessary and useful information.
- **Avoid confusion:** Name fields using your office's standard terminology.
- **Do not re-cycle fields:** If you need another field, create a fresh new one.
- **Plan carefully:** Once data is gathered for a field, deleting it will delete all its data.

How To

Create a New Custom Field

Learn how to create a new *Custom Field* to gather and track custom information on transactions.

Who Can Do This? Master admins

To create a new *Custom Field*:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [Custom Fields] from the *Customize* section of the left menu.
- 3 Click [Select Field Type] then select a *Field Type* from the dropdown menu.

The screenshot shows the 'Custom Fields' management page. At the top, there is a search bar and navigation links for Transactions, Tasks, Unassigned, Unreviewed, Reports, and Reference. The left sidebar contains a menu with sections: People (Manage Locations, Manage Users, Manage Contacts, Manage Contact Roles), Customize (Company Settings, Transaction Statuses, Transaction Labels, Document Labels, Document Names, Lead Sources, Custom Fields), Templates (Business Holidays, Checklists, Break Apart Docs), and Financials. The main content area is titled 'Custom Fields' and includes a warning message: 'Add up to 10 custom fields to your account. Custom fields added to this page will be activated on transactions, where data for those fields can be tracked. Optionally, set any date field as a "trigger date" to allow task due dates and scheduled messages to be triggered relative to that date.' Below this is a section for 'Custom field best practices' with the same guidelines as in the text above. A 'Create a New Custom Field (max: 10)' form is visible, with a dropdown menu for 'Field Type' showing options: Select Field Type, Date Field, Text Field, and List Field. The 'Field Name' input field is empty, and an 'Add Custom Field' button is present. Below the form is a table of existing custom fields:

Name	Type	Trigger Date	Actions
Transaction Coordinator	List		[Edit] [Delete] [Duplicate]
Contingency Removal	Date	✓	[Edit] [Delete] [Duplicate]
Agent Notes	Text		[Edit] [Delete] [Duplicate]
Deposit Due Date	Date		[Edit] [Delete] [Duplicate]

4 Enter the *Field Name*.

The screenshot shows the 'Custom Fields' page in a software application. The left sidebar contains navigation menus for 'People', 'Customize', 'Templates', and 'Financials'. The main content area is titled 'Custom Fields' and includes instructions on adding up to 10 custom fields. Below the instructions is a form to 'Create a New Custom Field (max: 10)'. The 'Field Type' is set to 'Text Field' and the 'Field Name' is 'Lockbox Code'. A green 'Add Custom Field' button is visible. Below the form is a table of existing custom fields:

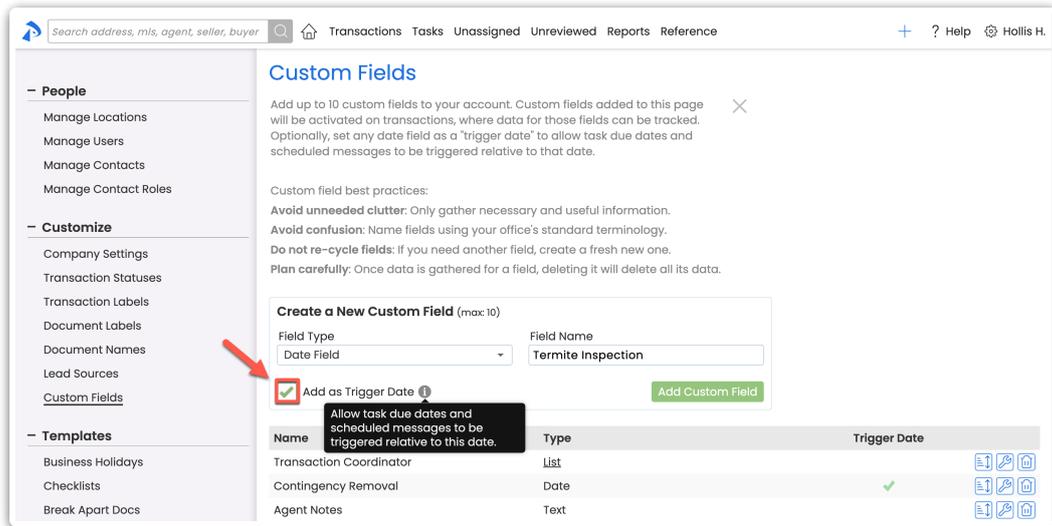
Name	Type	Trigger Date	
Transaction Coordinator	List		[Edit] [Delete] [Duplicate]
Contingency Removal	Date	✓	[Edit] [Delete] [Duplicate]
Agent Notes	Text		[Edit] [Delete] [Duplicate]
Deposit Due Date	Date		[Edit] [Delete] [Duplicate]

5 Complete any additional details for the new field.

- If you are adding a *Custom List Field*, enter up to 20 options. Click [+] to add additional options.

The screenshot shows the 'Custom Fields' page with the 'Create a New Custom Field' form. The 'Field Type' is now 'List Field' and the 'Field Name' is 'TC'. The 'Add Options (max: 20)' section shows 'Jim' as an option. A red box highlights the '+' button to add more options. Red arrows labeled '1' and '2' point to the '+' button and the 'Add Options' input field respectively. The 'Add Custom Field' button is still visible. The table of existing custom fields is the same as in the previous screenshot.

- If you are adding a *Custom Date Field*, you can optionally check [Add as Trigger Date] to allow task due dates and scheduled messages to be triggered relative to the date.



6 Click [Add Custom Field].

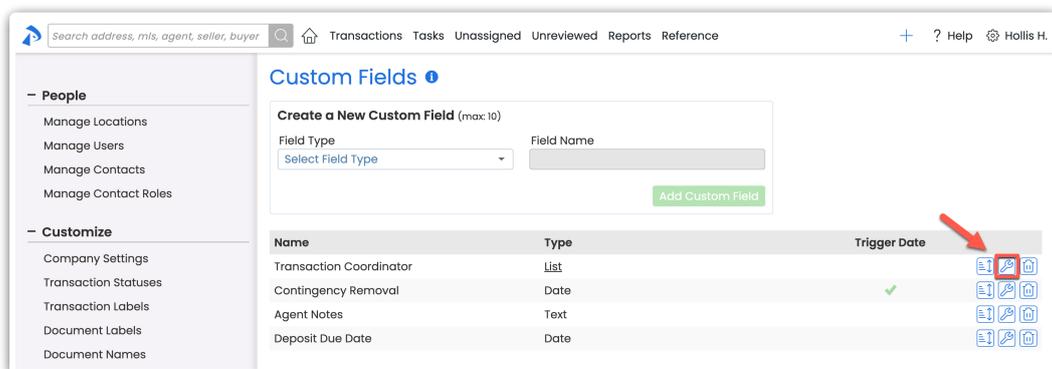
Edit a Custom Field

Learn how to make changes to a *Custom Field* and understand the impact those changes will have.

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To edit a custom field:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [Custom Fields] from the *Customize* section of the left menu.
- 3 Click [the wrench] to the right of the field you want to edit.



- 4 Make your desired changes to the field.
- 5 Click [Save].

Do not recycle fields: If you need another field, create a fresh new one.



Renaming fields should only be used to make corrections to existing field names.



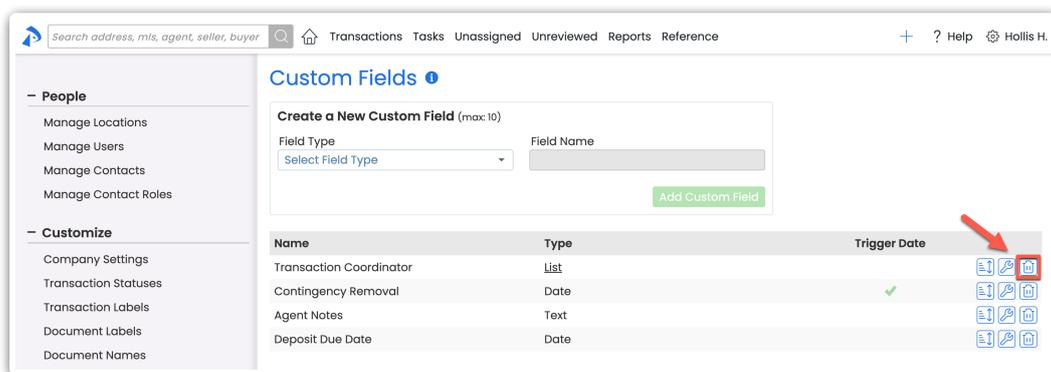
Delete a Custom Field

Learn how to permanently delete a *Custom Field* that is no longer needed.

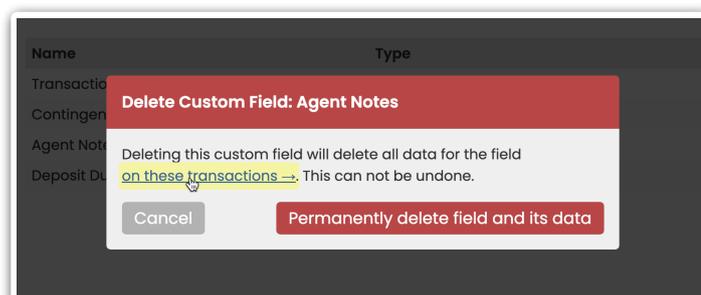
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To delete a *Custom Field*:

- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Select [**Custom Fields**] from the *Customize* section of the left menu.
- 3 Click [the trashcan] to the right of the field you want to delete.



- 4 Click [**on these transactions →**] to review the list of transactions where this *Custom Field* has data that will be deleted.



 Download the resulting list to use as a backup of the *Custom Field* data you're about to delete. [Learn how to Download a Transaction Spreadsheet →](#)

- 5 Click [**Permanently delete field and its data**] to permanently delete the field and any related data.

 Deleting a *Custom Field* will delete all data entered for the field. **This cannot be undone.**