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.

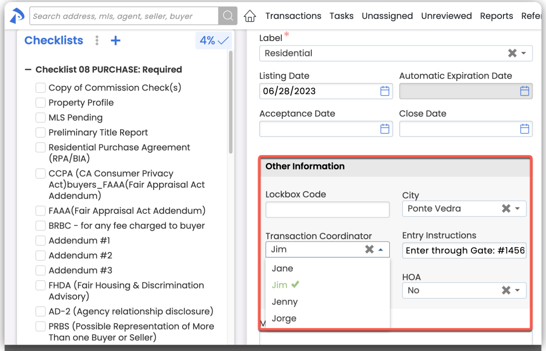
How They Work

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

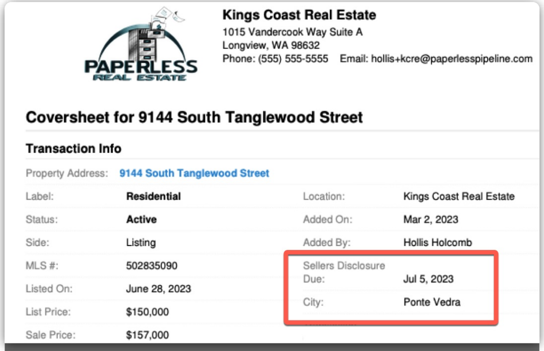
- A permanent, editable field on each transaction
- Displayed on *Coversheets*
- Available as an *Autofill Tag*
- Included in downloaded *Transaction Spreadsheet Reports*

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 →



Custom Fields when editing a transaction



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

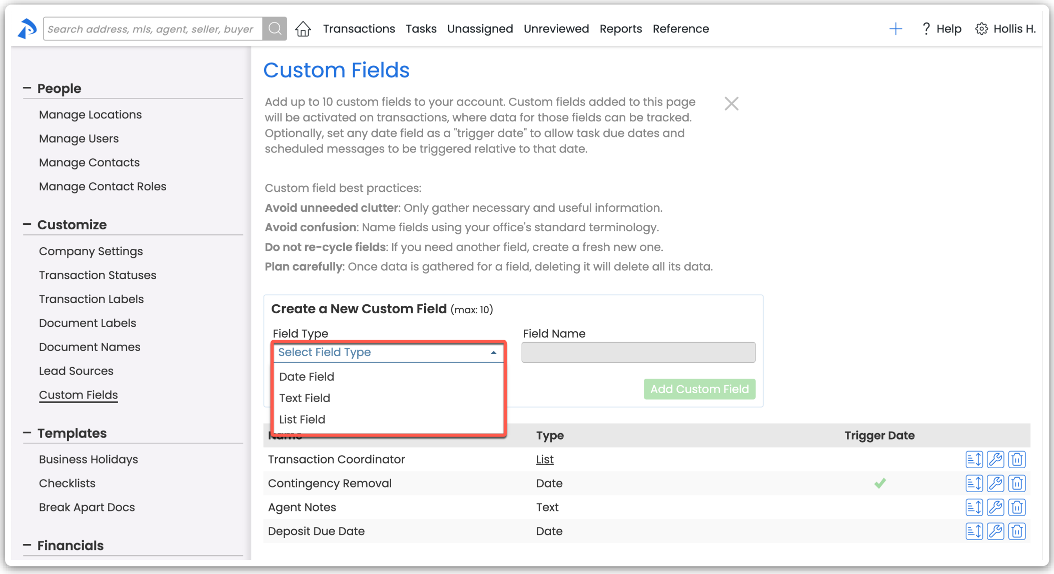
Create a New Custom Field

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

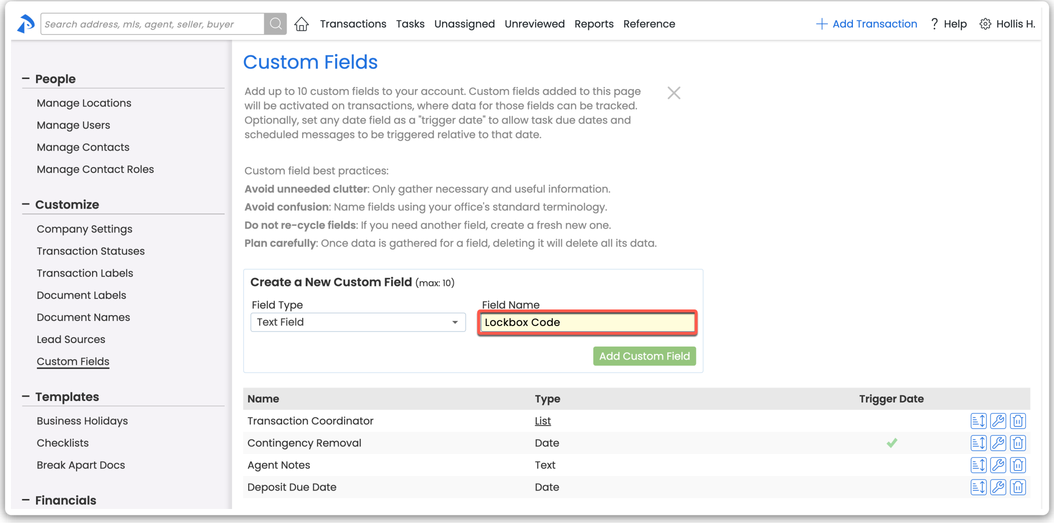
Who Can Do This? Master admins

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.**

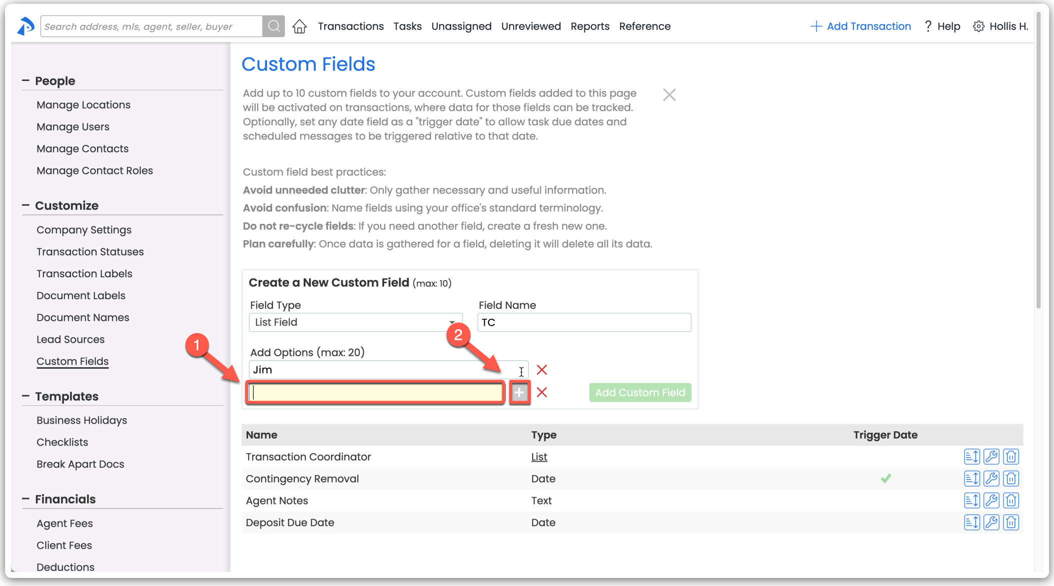


4 Enter the *Field Name*.

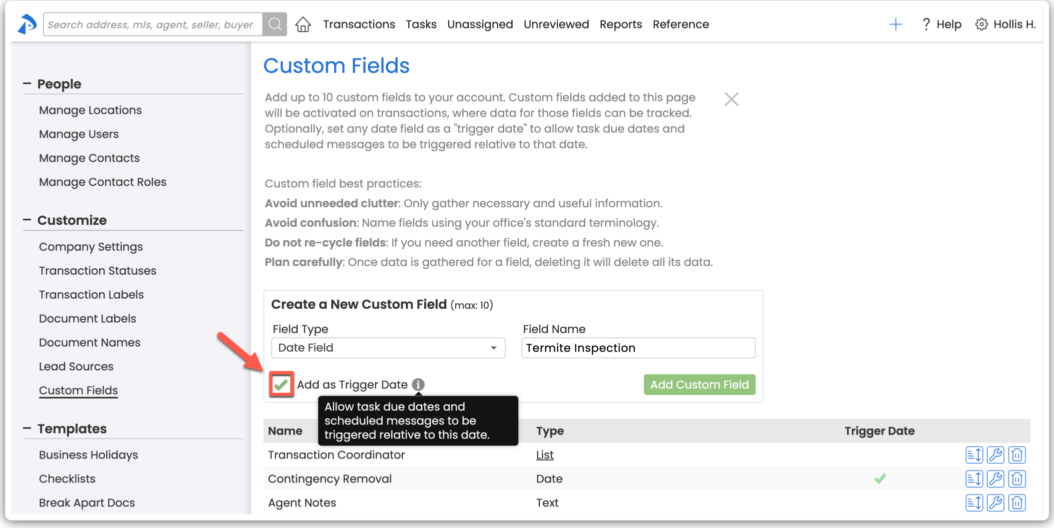


5 Complete any additional details for the new field.

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



- 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].**

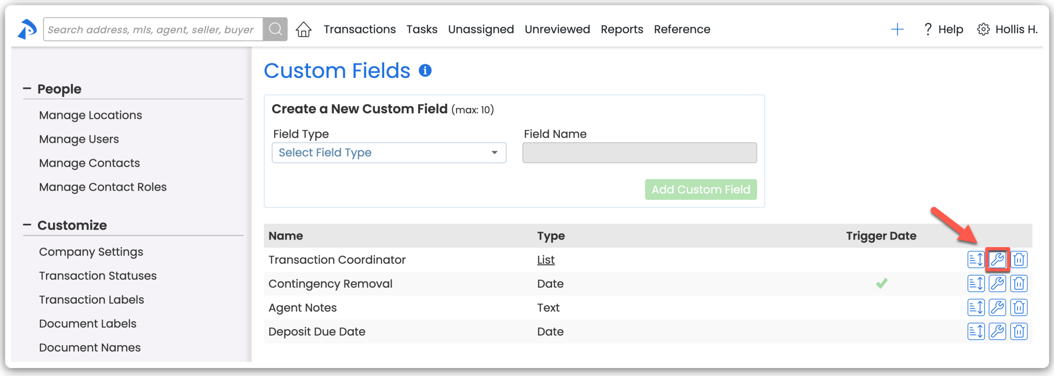
Edit a Custom Field

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

Who Can Do This? Master admins

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.

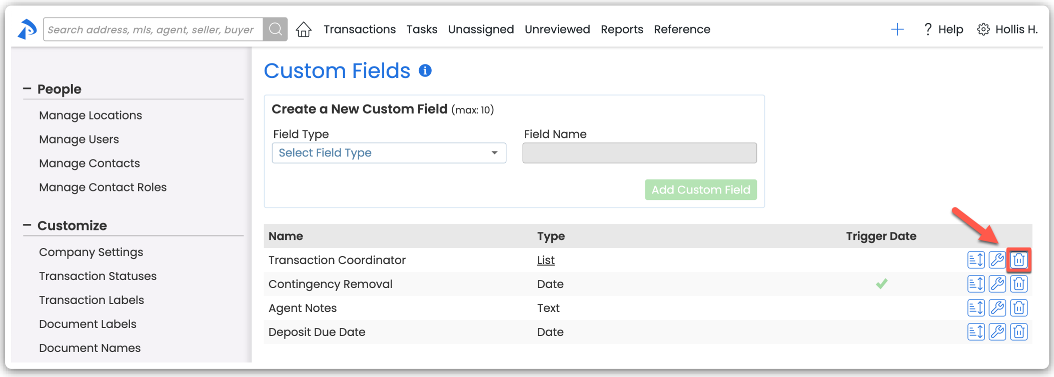
Delete a Custom Field

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

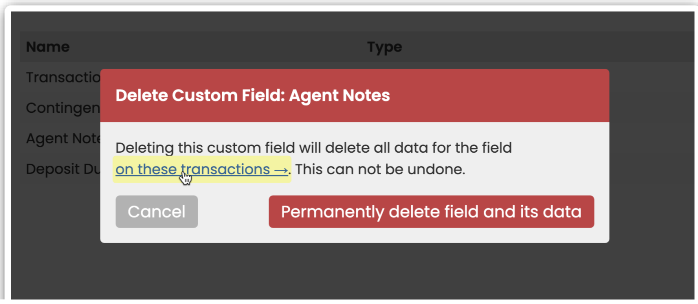
Who Can Do This? Master admins

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.**