Custom Fields

Add the fields your office needs, and Pipeline treats them like any other transaction detail.

Introduction

Every office tracks something the built-in fields don't cover. Adding a custom field for that detail gives it a permanent home on every transaction — filled in by your team, included on your coversheets, and pulled into your reports like everything else Pipeline tracks.

Build them as text, list, or date fields. Once a custom field is in place, it behaves just like a built-in field.

How It Works

Pick a type, name it, and Pipeline puts it everywhere a transaction detail belongs. A little planning up front keeps the list clean.

Three Field Types

Reach for a **text** field when you need free-form notes, a **list** field when you want to pick from set choices, or a **date** field when you're tracking a day that matters.

Where Custom Fields Appear

Add a field once and it's there for good, ready for your team to fill in on every transaction. Pipeline also includes it on your coversheets, drops it into messages as an autofill tag, and gives it its own column in downloaded Transaction Spreadsheet reports.

Date Fields Do More

Adding a date field? Check [Add as Trigger Date] as you're creating it, and Pipeline will start counting from that date automatically. Once it's set, task due dates and scheduled messages can be triggered relative to it. See Relative Due Dates.

Plan Before You Build

A few habits keep the list useful. Add only the fields your team will fill in on most transactions, name them the way your office already refers to them, and start a fresh field instead of repurposing an old one. Decide carefully before removing a custom field: if one is deleted, the related data goes with it.

Check the Other Field Options First

A custom field isn't the only way to shape what a transaction tracks. Check the other two first: what you're after may already exist, and every slot you don't spend stays free for something else.

Optional Fields

Pipeline provides a set of extra fields that arrive switched off — contract-milestone dates like inspection and loan approval, plus details like Earnest Money Amount, Lockbox Code, and Year Built. Using one doesn't spend a custom field slot, and any optional date field can anchor task due dates and scheduled messages from the moment it's turned on. See Optional Fields.

Default Values on More Info, Admin Info, and Commission Summary

These three free-text fields sit on every transaction already, and each can be templated with company-wide starting text. A prompt like `Transaction Coordinator Fee: _____` captures the info without adding a field at all. Reach for this when you need a reminder or nice-to-know details rather than a dedicated field. See Set Default Value for Transaction Fields.

Then Build a Custom Field

When optional fields or default values don't cover what you're tracking, build your own. Just avoid rebuilding a field you can already track somewhere else: having two fields for the same info means your team fills in whichever one they see first, and your reports stop agreeing with each other.

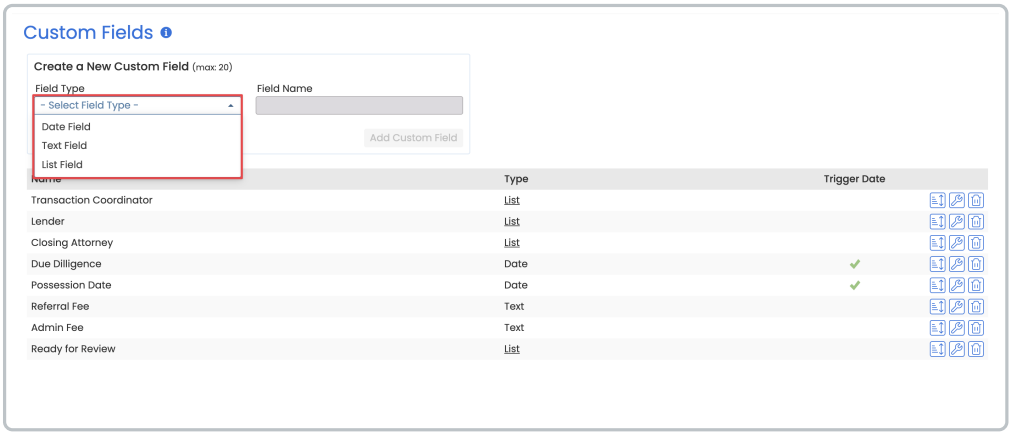
Create a New Custom Field

Add a field for something your office tracks that Pipeline doesn't.

Who Can Do This: Master Admins.

To create a new custom field:

1. Click the [Gear] 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] and choose a type from the dropdown.



4. Enter the field name.
5. Complete any extra details: for a list field, enter up to 20 options, clicking [+] to add each one after the first; for a date field, optionally check [Add as Trigger Date].
6. Click [Add Custom Field].

The new field now appears on every transaction, ready for your team to fill in.

Edit a Custom Field

Change a field you've already built, and know what the change impacts.

Who Can Do This: Master Admins.

To edit a custom field:

1. Click the [Gear] 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 change.
4. Make your changes and click [Save].

Your change shows up everywhere the field appears. Renaming is best for fixing a name that came out wrong — when you need a field for a different job, build a new one.

Delete a Custom Field

Remove a field for good, once you've taken a backup of what's in it.

Who Can Do This: Master Admins.

To delete a custom field:

1. Click the [Gear] 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 see every transaction holding data for this field.
5. Download that list first, so you keep a copy of what you're about to remove. See Download a Transaction Spreadsheet.
6. Click [Permanently delete field and its data] to finish.

The field disappears from every transaction, and its values go with it. This can't be undone, which is why the backup matters.