

# Optional Fields

Learn how *Optional Fields* work in Paperless Pipeline, including turning on *Optional Transaction Dates* and *Other Optional Fields*.

## Introduction

### What are Optional Fields?

*Optional Fields* are additional prebuilt transaction fields that can be enabled on your company's transactions, allowing your team to keep track of additional information that is not included on transactions by default.

### Optional Transaction Date Fields / Checklist Trigger Dates

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- Inspection Due Date
- Inspection Date
- Loan Approval Due Date
- Loan Approval Date
- Appraisal Due Date
- Appraisal Date
- Money Due Date
- Money Deposit Date
- Option Period End Date

### Other Optional Fields

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- Earnest Money Amount
- Year Built
- Lockbox Code
- Financing Type
- Home Warranty

### How They Work

When any field above is turned on, 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 *Optional Transaction Date Field* 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](#) →

## How To

### Turn On Optional Transaction Date Fields

[Learn how to turn on \*Optional Transaction Date Fields\*.](#)

**Who Can Do This?** Master admins

To turn on *Optional Transaction Dates*:

- 1 Go to **Company Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Scroll down to the section for *Optional Transaction Date Fields / Checklist Trigger Dates*.
- 3 Check the box next to any *Optional Transaction Dates* you'd like to turn on.

**Optional Transaction Date Fields / Checklist Trigger Dates**

<input type="checkbox"/> Enable Inspection Due Date	<input type="checkbox"/> Enable Inspection Date
<input type="checkbox"/> Enable Loan Approval Due Date	<input type="checkbox"/> Enable Loan Approval Date
<input type="checkbox"/> Enable Appraisal Due Date	<input type="checkbox"/> Enable Appraisal Date
<input type="checkbox"/> Enable Earnest Money Due Date	<input type="checkbox"/> Enable Earnest Money Deposit Date
<input type="checkbox"/> Enable Option Period End Date	

- 4 Save your settings.

### Turn On Other Optional Fields

Learn how to turn on *Other Optional Fields*.

**Who Can Do This?** Master admins

To turn on *Other Optional Fields*:

- 1 Go to **Company Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Scroll down to the section for *Other Optional Fields*.
- 3 Check the box next to any *Other Optional Fields* you'd like to turn on.

**Other Optional Fields**

<input type="checkbox"/> Enable Earnest Money Amount	<input type="checkbox"/> Enable Year Built
<input type="checkbox"/> Enable Lockbox Code	<input type="checkbox"/> Enable Financing Type
<input type="checkbox"/> Enable Home Warranty	

- 4 Save your settings.
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