Optional Fields

Optional Fields let you enable additional built-in fields on transactions — including key dates and property details that aren't included by default. These fields help your team track more without the need to build custom fields from scratch.

Introduction

Optional Fields are extra transaction fields that can be turned on by Master Admins to help teams track key data like deposit dates, lockbox codes, or home warranty status. These fields are prebuilt and can be toggled on or off depending on your company's needs.

Once enabled, Optional Fields appear on every transaction and behave like any standard field — editable by users, included in exports, and viewable in reporting.

How It Works

When an Optional Field is turned on:

- It appears on all new and existing transactions
- It can be filled in manually or used in reporting
- Date fields can be used as checklist trigger dates
- All fields show up in Transaction Spreadsheet Reports

Best Practices

- **Only enable what you need** — keep the transaction view focused
- **Use Date Fields as triggers** for tasks or calendar events
- **Use custom fields** if your team needs something not listed here

Optional Transaction Date Fields

These fields track specific deadlines and are often used as checklist triggers:

- 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

These fields support tracking additional transaction data:

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

Enable Optional Fields

Who Can Do This: Master Admins

Go to **Admin / Settings**

Select **[Optional Fields]** from the left-side menu

Check the boxes for each field you'd like to enable

Click **[Save]**