

What's New (June 25, 2023)

Easily track custom information important to your team with optional pre-set and custom fields

Optional Pre-set Fields

From [Company Settings](#) , click to turn on any of the following fields your office needs to track on transactions.

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

Custom Fields

Master admins can now add up to 10 *Custom Fields* to help their team track custom information that doesn't already have a field on transactions. From dates to lists to text fields, use these new fields to cleanly gather and track information that helps your team drive transactions to completion. Any custom date-type field can optionally be set as a *Trigger Date* to allow *Task Due Dates* and *Scheduled Messages* to be triggered relative to that date.

Custom Fields will appear in all places that regular transaction fields appear, including on *Coversheets*, as *Autofill Tags*, and in downloads. They'll also be searchable in either the *Transaction Date Range Search* or *Global Search* areas.

Master admins can create new *Custom Fields* by going to [Admin / Settings](#) , then clicking [Custom Fields] from the left menu.

[Learn more about Custom Fields →](#)

The screenshot shows the 'Custom Fields' management page. On the left is a sidebar menu with categories: People, Customize, Templates, and Financials. Under 'Customize', 'Custom Fields' is selected. The main content area has a title 'Custom Fields' and a close button. Below the title is a descriptive text and a list of best practices. A 'Create a New Custom Field' form is present, with fields for 'Field Type' (set to 'Date Field'), 'Field Name' (set to 'Disclosure Due'), and a checked 'Add as Trigger Date' option. 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]

Keep Contact Roles on transactions accurate and up to date

Keeping a clean list of suggested *Contact Roles* helps your team quickly and accurately categorize *Contacts* they add to transactions. The *Manage Contact Roles* page allows master admins to update or

hide inaccurate *Roles* to clean them up on existing transactions and prevent them from being suggested in the future.

[Learn how to Manage Contact Roles →](#)

Search address, mls, agent, seller, buyer

TransactionsTasksUnassignedUnreviewedReportsReference

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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

Manage Contact Roles

Contacts and the Roles assigned to them exist independently on each transaction.

This list allows you to update a Role across all its contacts on all transactions - or- hide (remove) it from the suggested Contacts dropdown menu (displayed when adding Contacts to transactions).

Bulk Search Roles

esc

Escrow (27)

Escrow Agent (6)

Escrow Company (6)

Escrow Officer (5)

☐ Escrow Company

☐ Escrow Officer

Search

Occurrences	Last Added
27	Feb 18, 2023
6	Jan 26, 2023
6	Apr 18, 2023
5	Jan 19, 2022

Keyboard Hot Keys updated

If you're not using keyboard hot keys to perform frequent actions in Pipeline, you should give them a try! Using hot keys allows you to quickly navigate to the areas in Pipeline you access frequently. A few of the key-combinations for hot keys have been updated, so take a moment to review the updates or learn new ones you didn't know about.

[Learn more about Keyboard Shortcuts →](#)