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

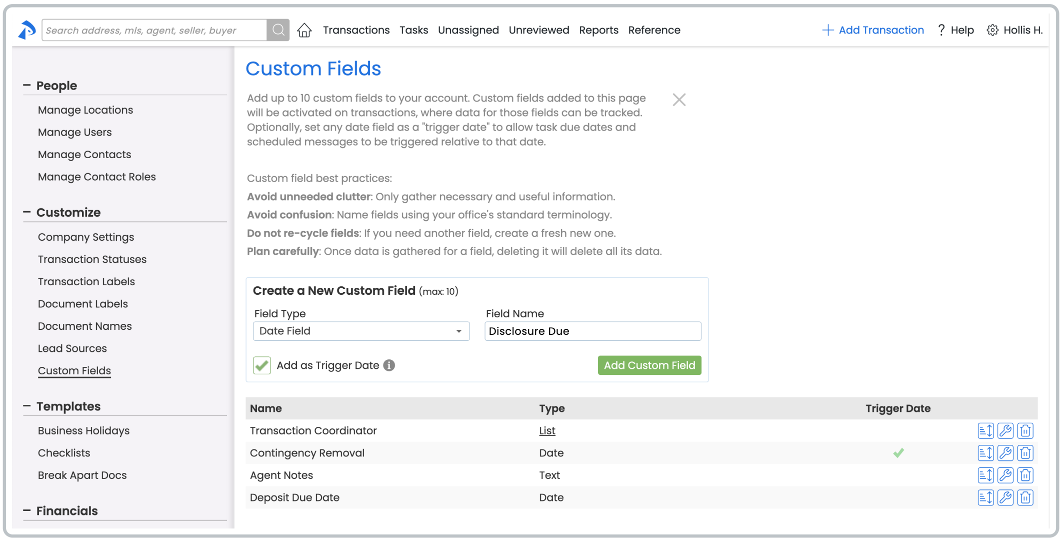
Custom Fields

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 Message*s 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.

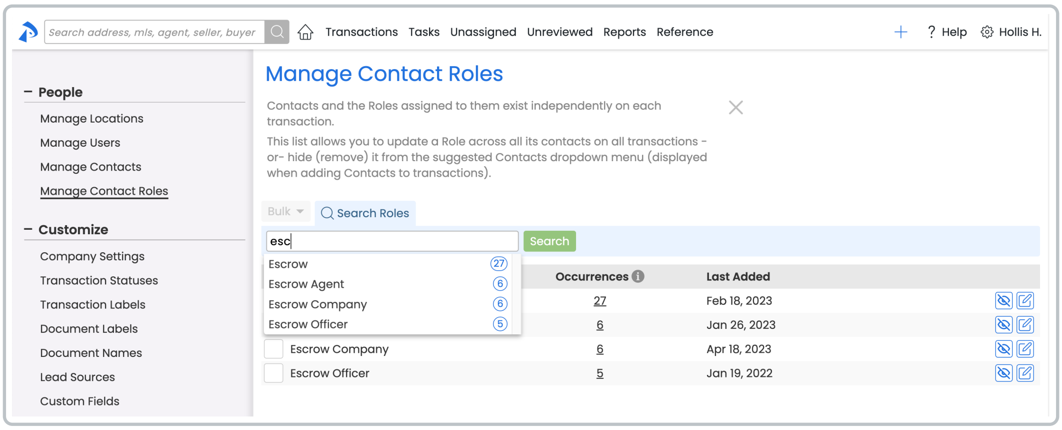
Learn more about Custom Fields →



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 →



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 →