What's New (August 24, 2026)

Last Modified on 11/10/2026 12:29 pm EST

Twice as Many Custom Fields

Custom fields just got a lot more room to grow. You can now create up to 20 custom fields, double what you had before.

And it's not just extra storage. Whatever you put in a custom field, Pipeline knows what to do with it: find it instantly in Power Search, pull it straight into your Transaction Spreadsheets, autofill it into messages, or include it in coversheets.

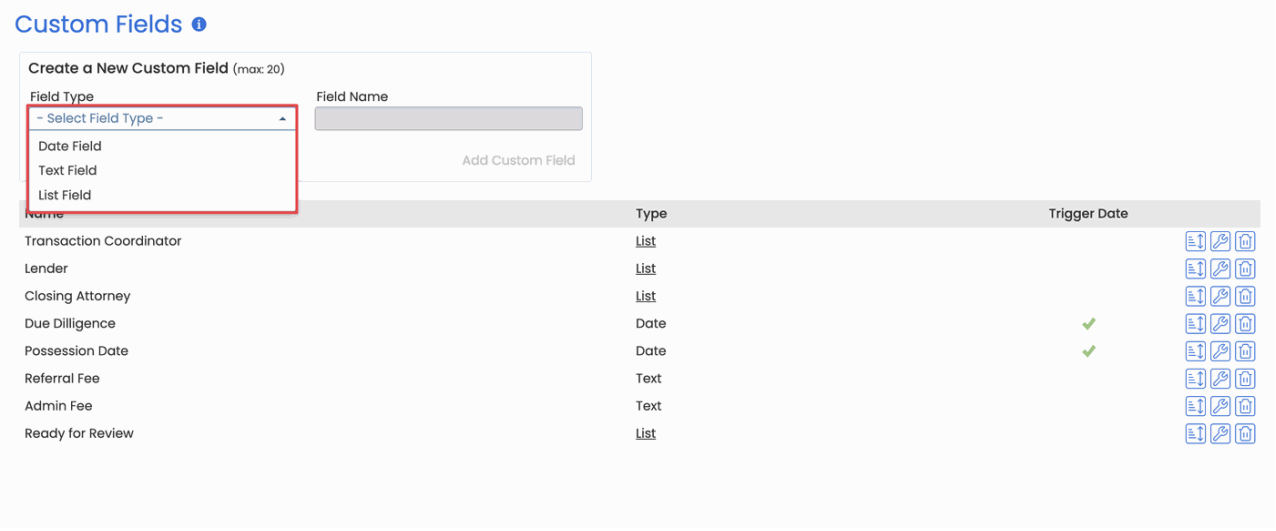
Even better, Pipeline AI can save even more time by filling them in for you. Run AI Create or AI Update, and it'll match your custom fields by name and pull them straight from the document. No retyping.

Here's how to add 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 [Select Field Type], choose a type, name your field, then click [Add Custom Field].

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

Quick tip before you use up a slot: check Optional Fields in Company Settings first. Pipeline's already built in a bunch of the common ones, and turning them on won't cost you a custom field.



See Custom Fields.

More Send Times for Scheduled Messages

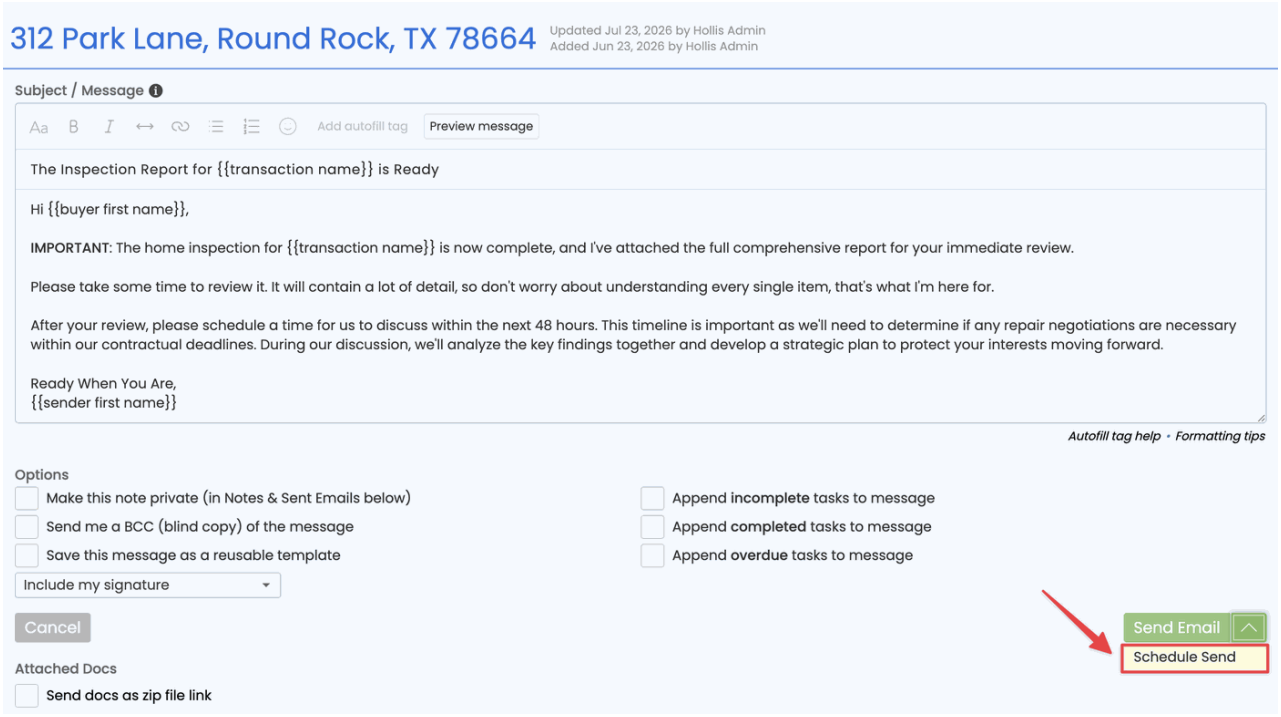
Scheduling a message just got a lot more flexible. Pick from six delivery times now, with three new options: 9am, 12pm, and 4pm EST.

Send times are set in Eastern. Pick the one that lands where you want it locally.

Here's how to pick a send time:

1. Open the transaction and compose your message in the Note/Email area.
2. Click [the down arrow] attached to the Send button, then [Schedule Send].
3. Click [Absolute Date], choose your date and one of the six delivery times, then click [Schedule Send].

From there, the message waits in that transaction's Scheduled Messages area and sends itself right on time.



See Message Scheduling.