

Set Default Value for Transaction Fields

SUMMARY

Learn how to set default values (including placeholder information) to be automatically inserted into the *More Info*, *Admin Info*, and *Commission Summary* fields on all new transactions.

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Introduction

The *More Info* and *Admin Info* fields are flexible transaction fields that allow you to track and tag custom information not covered by other transaction fields and features. And the *Commission Summary* field is useful for storing commission-specific details that will be important to know when managing commissions on a transaction. To encourage agents and admins to enter specific information into these fields, you can set a company-wide default value to be automatically added to each of those fields whenever a new transaction is created. It's especially helpful to include placeholder information (e.g., Home Warranty: Y/N, Lock box number: _____, etc.) to prompt team members to enter the information needed.

Who Can Do This?

Only [master admins](#) can set a default value for transaction fields.

Set a Default Value for Transaction Fields

To set a default value for transaction fields:

1 Go to Admin / Settings

- Click your name in the upper right corner, then [Admin / Settings].

- 2 Scroll down to the *Transaction Settings* section.
- 3 In each field for *Pre-filled default values*, enter your desired default values for *More Info*, *Admin Info*, and *Commission Summary* (described below).
- 4 Click [Save Settings].

More Info

The *More Info* field is ideal for tracking general information not covered by other transaction fields.

To set a default value for *More Info*:

- 1 In the box for *Pre-filled default value for "More Info" field*, enter your desired information to be automatically inserted into the *More Info* field on transactions.

Pre-filled default value for "More Info" field

Property URL -

FSBO -

Lock box - #

Year Built -

HOA -

Home Warranty -

Legal Description - _ _ _ _ _

Admin Info

The *Admin Info* field is ideal for tracking information that should *only be* visible to admins.

To set a default value for *Admin Info*:

- 1 In the box for *Pre-filled default value for "Admin Info" field*, enter your desired information to be automatically inserted into the *Admin Info* field on transactions.

Pre-filled default value for "Admin Info" field

Flagged for Admin's Review - Enter Y or N
Transaction Coordinator Requested - Enter Y or N
Agent's Plan - Enter BASIC or PREMIUM
Special Notes - _____

Commission Summary

The *Commission Summary* field is ideal for storing commission information that will be important to know when managing commissions on a transaction.

To set a default value for *Commission Summary*:

- 1 In the box for *Pre-filled default value for "Commission Summary" field*, enter your desired information to be automatically inserted into the *Commission Summary* field on transactions.

Pre-filled default value for "Commission Summary" field

Earnest Money Amount - \$
Commission Percent - \$
Broker Commission - \$
Referral Fee - \$

Pipeline Pro Webinar Recording: Effective Ways to Utilize the More Info Field

This week we'll go over several creative and practical examples of how the *More Info* field can help improve your efficiency in Pipeline. Be sure to pop in!

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