

Optional Fields

Learn how *Optional Fields* work in Paperless Pipeline, including turning on *Optional Transaction Dates* and *Other Optional Fields*.

Introduction

What are Optional Fields?

Optional Fields are additional prebuilt transaction fields that can be enabled on your company's transactions, allowing your team to keep track of additional information that is not included on transactions by default.

Optional Transaction Date Fields / Checklist Trigger Dates

- 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

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

How They Work

When any field above is turned on, it will be:

- A permanent, editable field on each transaction
- Displayed on *Coversheets*
- Available as an *Autofill Tag*

- Included in downloaded *Transaction Spreadsheet Reports*

Any *Optional Transaction Date Field* turned on will also be:

- Added as a *Relative Trigger Dates* for *Tasks* and *Scheduled Messages*. [Learn more about Adding Relative Due Dates →](#)
- Available to be synced to your calendar. [Learn how to sync key dates to calendars →](#)

How To

Turn On Optional Transaction Date Fields

[Learn how to turn on *Optional Transaction Date Fields*.](#)

Who Can Do This? Master admins

To turn on *Optional Transaction Dates*:

- 1 Go to **Company Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Scroll down to the section for *Optional Transaction Date Fields / Checklist Trigger Dates*.
- 3 Check the box next to any *Optional Transaction Dates* you'd like to turn on.

Optional Transaction Date Fields / Checklist Trigger Dates

☐ Enable Inspection Due Date	☐ Enable Inspection Date
☐ Enable Loan Approval Due Date	☐ Enable Loan Approval Date
☐ Enable Appraisal Due Date	☐ Enable Appraisal Date
☐ Enable Earnest Money Due Date	☐ Enable Earnest Money Deposit Date
☐ Enable Option Period End Date	

- 4 Save your settings.

Turn On Other Optional Fields

[Learn how to turn on *Other Optional Fields*.](#)

Who Can Do This? Master admins

To turn on *Other Optional Fields*:

- 1 Go to **Company Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 Scroll down to the section for *Other Optional Fields*.
- 3 Check the box next to any *Other Optional Fields* you'd like to turn on.

Other Optional Fields

☐ Enable Earnest Money Amount	☐ Enable Year Built
☐ Enable Lockbox Code	☐ Enable Financing Type
☐ Enable Home Warranty	

- 4 Save your settings.