Get Agents to Fill In the Fields You Need

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Pipeline can't make a field required, but a checklist can make it hard to skip — and once it's built, the chasing runs itself.

Introduction

You've asked three times. The listing date is still blank, the buyer's name never got entered, and the lender isn't on the contacts. Somewhere between the agent's phone and your file, the details you need to run the office quietly go missing.

Here's the plain truth first, because it saves you a search. Pipeline already requires a few fields, status among them. Beyond those, you can't make a transaction field mandatory. Not the prebuilt optional fields, not the ones you built yourself with Custom Fields. There's no required toggle to find, and that has been the answer for more than a decade.

What offices use instead is a checklist. One task per fact you need, a due date that works itself out, and a template that lands on every new deal. Then the daily reminder email does the asking. It matters past tidiness, too: a relative due date can't calculate until the date it counts from exists, so a blank acceptance date doesn't just leave a hole in the file, it stalls every deadline hanging off it.

When to Use This

- Agents leave the listing date, the buyer's name, or the sale price blank and you're the one filling them in later.
- You built a custom field and went looking for the setting that makes it required.
- Your checklists auto-apply on a transaction label the agent never sets, so the right checklist never shows up.
- Tasks are showing a blank due date because nobody ever entered the transaction date their rule counts from.
- A closing came up short because nobody had entered the escrow deposit information.

Why a Checklist Does the Enforcing

The instinct is to look for a setting — a required checkbox beside the field, or a rule that won't let the transaction save until the box is filled. It isn't there, and waiting for it means the fields stay blank.

A checklist gets you the same outcome from the other direction. Rather than blocking the transaction at creation, when the agent often doesn't have the answer yet, it puts the missing item on a list with a date on it, in front of the person who owes it, every morning, until it's done. It also leaves a record: an unchecked task is a visible, searchable statement that something is outstanding. A blank field says nothing at all.

1. Decide Which Fields Are Actually Required

Not everything deserves a task. Keep the list to the fields that block work downstream, and it tends to be three kinds.

Dates other deadlines count from — acceptance, listing, closing, expiration. These earn a place before anything else, because relative due dates elsewhere on the checklist are waiting on them.

Facts that print or report — buyer and seller names, sale price, commission. If it lands on a coversheet or in a production number, a blank one gets noticed at the worst moment.

People who have to be reachable — the lender, the escrow officer, the co-op agent. And if your checklists auto-apply on a transaction label, add the label to the list too: nothing else on this page fires until that field is set.

2. Prompt at Entry With a Default Value

The cheapest catch is at the moment of entry, while the agent is already looking at the form. A default value puts your own words into the **More Info** field on every new transaction — a short line naming what you expect to see there, waiting for them instead of arriving three days later as a complaint.

Pre-fill the More Info, Admin Info, and Commission Summary fields on every new transaction so nothing important gets forgotten.

See Default Field Values

3. Add One Task per Missing Field

Write each one as the action you want, not as a category: *Enter Listing Date*, *Add Buyer Name*, *Add Lender as Contact*, *Enter Earnest Money Deposit Info*. One fact per task, phrased as an instruction, and named distinctly enough that you can search for it later when you want to know who's still outstanding.

The tasks on a checklist are the documents to collect and the steps to finish on a transaction.

See Document Names or Tasks to Track

> Add these to the **template**, not to one transaction. A template change reaches every transaction the checklist lands on from that point forward — transactions already running keep the checklist they were given, and there's no way to push a new task onto them in bulk.

4. Give Each Task a Relative Due Date

This is the part that does the work. A task with no due date never reaches anyone's Tasks page and never triggers a reminder — it just sits on the transaction being ignored. Set the date as a rule off something the transaction already has, so every deal arrives with its dates worked out and nobody types one in.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

> Don't anchor a task to the very field it's chasing. A rule that counts from the acceptance date shows a blank placeholder until someone enters the acceptance date — which is exactly the moment you needed the reminder. Anchor the *enter this date* tasks on transaction creation, and save the milestone anchors for the tasks that follow a date rather than produce it.

5. Auto-Apply the Template So It Lands on Every Deal

None of this holds if someone has to remember to add the checklist. Give the template a rule and it adds itself, which is what turns a good intention into a standard.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See [Checklist Auto-Apply Rules]

> If the rule reads a label the agent is supposed to set, you've built a circle — the checklist that reminds them to set the label can't apply until they set it. Key that one template on status instead, since Pipeline already requires status on every transaction, or apply it by hand.

6. Let the Daily Reminder Do the Chasing

Once the tasks are dated and the template applies itself, the follow-up stops being your job. Each person gets a morning email listing what's overdue and what's due, and it keeps arriving until the task is checked off.

Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

See [Daily Task Reminder Emails]

Naming the person on the task makes it unmistakable — an @mentioned task shows up green for them wherever they see it, including in that morning email.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See [Task @Mentions]

7. Back It With an Office Rule

The last piece isn't a setting, and it's the one that actually closes the gap. Offices that get clean data tie the checklist to something the agent cares about — most commonly, the commission check doesn't go out until the checklist is clear.

Pipeline can supply the list, the deadline, and the reminder. What it can't supply is the consequence, and a checklist nobody is held to is a checklist nobody finishes.