Custom Fields FAQ

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Custom fields come in text, list, and date types, and deleting one removes its data. Answers to the common questions about how many you can have, making a field required, and who can edit them.

How many custom fields can I have?

Up to 20. It still pays to plan: set up the fields you'll use most and name them in your office's standard terms, so the list stays easy for your team to read.

What field types can I create?

Text, list, and date. A text field takes free-form notes, a list field offers up to 20 preset choices, and a date field captures a date — which you can also set as a trigger for tasks and scheduled messages.

Can I make a custom field required?

Not today. Custom fields are always optional to fill in. A common workaround is a default value or a naming prompt that reminds your team what to enter. If a required option would help, tell us.

What happens if I delete a custom field?

All of its data is deleted, permanently. Before deleting, click through to the list of transactions holding that field's data and download it as a backup. The deletion can't be undone.

Can agents edit custom fields?

Yes. Any agent on a transaction can edit its custom fields. If a different field won't let an agent make a change, that's a permissions rule — see Why Can't I Update a Transaction Field?.

Can I add a custom field to the General section of a transaction?

No. Custom fields appear together in their own area on the transaction, not mixed into the General section. They still show on coversheets and in spreadsheet reports.

Learn More

Build your own transaction fields to capture the data Pipeline doesn't already track.

Build the fields your office needs, and Pipeline treats them like every other transaction detail.

See Custom Fields

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.