# Custom Fields

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

## Introduction

Every office tracks a few things Pipeline doesn't have a field for. A buyer agency agreement that runs out, an escrow number, a flag for a dual-agency deal. Without a place on the transaction, that detail ends up in a spreadsheet next to Pipeline, where nobody else on the deal can see it.

A custom field gives it that place. You build it once as text, as a list to pick from, or as a date, and it shows up on every transaction, prints on the coversheet, and gets its own column when you download a Transaction Spreadsheet. A date field goes furthest, because Pipeline can count task due dates and scheduled messages from it.

The one thing to weigh before you build is that every field shows on every transaction, whatever kind of deal it is. A field that matters only on leases still sits on every sale, and each one uses one of your 20 slots. So spend them on the details most of your deals carry.

## How It Works

Pick a type, name it, and Pipeline puts it everywhere a transaction detail belongs. A little planning up front keeps the list clean.

### Three Field Types

Reach for a **text** field when you need free-form notes, a **list** field when you want your team picking from set choices (up to 20 of them), and a **date** field when you're tracking a day that matters.

### Where Custom Fields Appear

Add a field once and it's there for good, sitting on every transaction and ready for your team to fill in. Pipeline prints it on your coversheets, drops it into documents and messages as an autofill tag, and gives it its own column in downloaded Transaction Spreadsheet reports.

### Date Fields Do More

Building a date field? Check [Add as Trigger Date] while you're creating it, and Pipeline starts counting from that date — task due dates and scheduled messages both fire relative to it. See Trigger Dates.

A custom date field doesn't reach your calendar by itself. Base a task's relative due date on it, and that task syncs to your calendar like any other. See Calendar Syncing.

### Plan Before You Build

A few habits keep the list useful. Add only the fields your team will really fill in, name them the way your office already says them out loud, and start a fresh field instead of repurposing an old one. And decide carefully before you delete: a field's data goes with it.

# Check the Other Field Options First

A custom field isn't the only way to shape what a transaction tracks — it's just the only one you build from scratch. Check the other two first: what you're after may already exist, and every slot you don't spend stays free for something Pipeline genuinely doesn't offer.

## Optional Fields

Pipeline ships a set of extra fields that arrive switched off — contract-milestone dates like inspection and loan approval, plus details like Earnest Money Amount, Lockbox Code, and Year Built. Turning one on takes a checkbox, it doesn't spend one of your custom field slots, and an optional date field can anchor task due dates and scheduled messages the moment it's on. See Optional Fields.

## Default Values on More Info, Admin Info, and Commission Summary

These three free-text fields sit on every transaction already, and each can be seeded with company-wide starting text. A prompt like `Lockbox #: _____` gets the detail captured without adding a field at all — reach for this when what you need is a reminder rather than a column of its own. See Default Field Values.

## Then Build a Custom Field

When neither covers what you're tracking, build your own. Just avoid rebuilding something you could have switched on: two fields holding the same fact means your team fills in whichever one they see first, and your reports stop agreeing with each other.

# Create a New Custom Field

Add a field for something your office tracks that Pipeline doesn't.

**Who Can Do This:** Master Admins.

To create a new 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] and choose a type from the dropdown.
4. Enter the field name.
5. Complete any extra details: for a list field, enter up to 20 options, clicking [+] to add each one after the first; for a date field, optionally check [Add as Trigger Date].
6. Click [Add Custom Field].

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

# Edit a Custom Field

Change a field you've already built, and know what the change touches.

**Who Can Do This:** Master Admins.

To edit 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 [the wrench] to the right of the field you want to change.
4. Make your changes and click [Save].

Your change shows up everywhere the field appears. Renaming is best saved for fixing a name that came out wrong — when you need a field for a different job, build a fresh one.

# Delete a Custom Field

Remove a field for good, once you've taken a backup of what's in it.

**Who Can Do This:** Master Admins.

To delete 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 [the trashcan] to the right of the field you want to delete.
4. Click [on these transactions →] to see every transaction holding data for this field.
5. Download that list first, so you keep a copy of what you're about to remove. See Transaction Spreadsheet Downloads.
6. Click [Permanently delete field and its data] to finish.

The field disappears from every transaction, and its values go with it. This can't be undone, which is why the backup matters.

# Frequently Asked Questions

## 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, and there's no setting that makes one mandatory. A default value or a naming prompt reminds your team what to enter, and a checklist task with a due date chases whatever's still blank. See Get Agents to Fill In the Fields You Need. 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.