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 something the product doesn't ship a field for. An escrow number, a dual-agency flag, the date a buyer agency agreement runs out. It ends up in a spreadsheet, or in somebody's head, or in a notes box where nothing can count it.

A custom field is one you build yourself, and once it exists Pipeline stops treating it as an add-on. It behaves like a field that shipped with the product, which is the whole point: the detail your office tracks becomes something the system can print, sort, and count rather than something you keep alongside it. Fields come as free text, as a set list to choose from, or as a date, and a date Pipeline knows about is a date it can count from.

So the thing that used to live in a spreadsheet lives on the deal. What's worth doing first is a look at what's already there. Pipeline ships a set of fields switched off, and the free-text boxes on every transaction can carry a standing prompt. Neither costs you a custom field slot, and slots are limited, so the ones you spend are best spent on what nobody else would have thought to build.

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.

Those dates ride along to your calendar too, so the deadline turns up where you already look. 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. SeeTransaction 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.

Custom Fields FAQ

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. See Custom Fields FAQ, or Why Can't I Update a Transaction Field? if a field won't let you make a change.

Custom Fields Troubleshooting

When a field won't cooperate, start here.

- Why Can't I Update a Transaction Field?