Default Field Values FAQ

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Defaults cover three fields, seed new transactions, and stay fully editable. Answers to the common questions about which fields qualify, existing transactions, and who can set them.

Which fields can have a default value?

More Info, Admin Info, and Commission Summary. These three flexible fields are the ones you can pre-fill company-wide. Other transaction fields don't take a default.

Do default values apply to existing transactions?

No — only new ones. A default is inserted when a transaction is created, so anything already in your account stays exactly as it is.

Can agents change or remove the default text?

Yes. A default is just pre-filled text. Whoever works the transaction can edit it, replace it, or clear it out. Keep in mind Admin Info is only visible to admins.

Who can set default field values?

The master admin. Defaults live in the Transaction Settings section of your admin settings, so they apply consistently across the whole company.

What should I put in a default?

Placeholder prompts work best. Short reminders like `Home Warranty: Y/N` or `Lockbox #: _____` tell your team what to enter without cluttering the field.

Learn More

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

See [Default Field Values]

Still Have Questions?

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