Default Field Values

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

Introduction

You ask for the lockbox code on every deal and you get it on about half of them. Chasing a missing detail after the fact costs more than asking for it up front, and the moment to ask is while the transaction is being created.

Three fields on a transaction are open text rather than structured data: More Info, Admin Info, and Commission Summary. That openness is what makes them useful, and it's also what makes them the fields most likely to come back empty, because an empty box asks the reader nothing. A default value is text your account drops into those boxes on every new transaction, decided once for the whole company rather than deal by deal.

The move that makes this work is treating the default as a prompt rather than as content. Set More Info to read Lockbox #: _____ and whoever opens the transaction knows exactly what's wanted, without anybody having to explain the office's conventions first. And nothing about it is binding; whoever works the deal types over it like any other text.

How It Works

Defaults apply to three specific fields, they seed each new transaction, and anyone can edit them from there.

The Three Fields

More Info is for general details not covered elsewhere. Admin Info is for details only admins should see. Commission Summary is for commission-specific notes that matter when managing a deal.

They Seed New Transactions

A default value is inserted automatically whenever a new transaction is created. Existing transactions aren't changed — defaults are a starting point for what comes next.

Fully Editable

A default is just pre-filled text. Whoever works the transaction can edit it, replace it, or clear it out entirely.

Set a Default Value for Transaction Fields

> Enter your default text for More Info, Admin Info, and Commission Summary in your company settings.

> **Who Can Do This**: The master admin.

To set a default value for transaction fields:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Scroll to the Transaction Settings section.
3. In the "Pre-filled default value" box for More Info, enter the text you want inserted on new transactions.
4. Do the same in the boxes for Admin Info and Commission Summary as needed.
5. Click [Save Settings].

From now on, every new transaction opens with your default text already in those fields, ready to fill in or edit.

Default Field Values FAQ

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. See Default Field Values FAQ.