Optional Fields FAQ

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Optional fields are Pipeline's prebuilt fields, split into date fields and other details, and the date fields can trigger tasks. Answers to the common questions about optional vs. custom fields, what's available, and who can fill them in.

What's the difference between optional fields and custom fields?

Optional fields are prebuilt; custom fields you build yourself. Turn on an optional field when Pipeline already offers what you need (like an inspection date). Create a custom field when you need something Pipeline doesn't have.

Which optional fields can I turn on?

Two groups. Date fields: Inspection Due Date, Inspection Date, Loan Approval Due Date, Loan Approval Date, Appraisal Due Date, Appraisal Date, Money Due Date, Money Deposit Date, and Option Period End Date. Other fields: Earnest Money Amount, Year Built, Lockbox Code, Financing Type, and Home Warranty.

Can an optional date field trigger a task or message?

Yes. Every optional date field you turn on can be used as a relative trigger date, so task due dates and scheduled messages can fire a set number of days before or after it. Those dates can also sync to your calendar.

Can agents fill in optional fields?

Usually, yes — subject to the same edit rules as other transaction fields. An agent's ability to edit a given field depends on the transaction's status and their permissions. If a field looks read-only to an agent, see Why Can't I Update a Transaction Field?.

Do optional fields show on coversheets and reports?

Yes. Once turned on, an optional field appears on transaction coversheets, works as an autofill tag in your documents and messages, and is included in downloaded Transaction Spreadsheet reports.

Learn More

Turn on prebuilt fields like inspection dates and earnest money to track the details your team cares about.

See Optional Fields

Still Have Questions?

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