Optional Fields

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

Introduction

Every office tracks a couple of things a transaction doesn't show by default. An inspection date. Earnest money. A lockbox code. The transaction has room for all of them already; the fields are just switched off.

Optional fields are Paperless Pipeline's own fields, built and waiting, rather than something your office has to design. They arrive in two groups: date fields for the contract milestones a deal runs on, and a set of detail fields for things like earnest money and year built. Which ones are on is a company-level choice rather than a per-deal one, and that's on purpose. A field that's filled in on some transactions and missing from others is a field nobody trusts in a report.

Turn a field on and it's there, on every transaction, behaving like the fields that came with the product. More of the deal gets captured and your office builds nothing. And if the detail you need genuinely isn't one Pipeline offers, that's not a dead end; custom fields cover what nobody prebuilt.

How It Works

Optional fields come prebuilt, they show up everywhere a transaction detail would, and the date fields can drive your task due dates and scheduled messages.

The Two Groups

Optional **date** fields cover contract milestones — Inspection Due Date, Inspection Date, Loan Approval Due and Date, Appraisal Due and Date, Earnest Money Due Date, Earnest Money Deposit Date, and Option Period End Date. The **other** optional fields cover Earnest Money Amount, Year Built, Lockbox Code, Financing Type, and Home Warranty.

Two Fields With Set Choices

Financing Type and **Home Warranty** are pick lists with these choices:

Field	Choices
Financing Type	Conventional, Cash, DPA, FHA, Jumbo Loan, Owner Financing, Private Party Loan, USDA, VA, Waived Financing, Other
Home Warranty	Paid by Seller, Paid by Buyer, Paid by Agent, None

What Turning One On Does

Once a field is on, it becomes a permanent, editable field on every transaction. It also shows on coversheets, works as an autofill tag in your documents and messages, and is included in downloaded Transaction Spreadsheet reports.

Date Fields Do More

Any 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. The date itself doesn't sync to your calendar, but a task due relative to it does.

Optional Fields vs. Custom Fields

Optional fields are Pipeline's prebuilt fields that you toggle on. When you need something Pipeline doesn't offer, build your own with Custom Fields instead.

Turn On Optional Contingency Date Fields

Enable contract-milestone date fields from your company settings.

Who Can Do This: The master admin.

To turn on optional contingency date fields:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Scroll to the section for Optional Contingency Date Fields / Checklist Trigger Dates.
3. Check the box next to any date fields you'd like to turn on.
4. Save your settings.

Each field you enabled now appears on every transaction and is available as a trigger date for tasks and scheduled messages.

Turn On Other Optional Fields

Enable fields like Earnest Money Amount and Lockbox Code from your company settings.

Who Can Do This: The master admin.

To turn on other optional fields:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Scroll to the section for Other Optional Fields.
3. Check the box next to any fields you'd like to turn on.
4. Save your settings.

The fields you chose now appear on every transaction, on coversheets, and in your spreadsheet reports.

Make One of These Dates Do Something

Switching on Inspection Date gets you somewhere to record it, and nothing else happens on its own. The step that turns a recorded date into a deadline is a separate one, set up once for the whole account rather than deal by deal.

Pick the date a deadline counts from, and Pipeline works the rest out on every transaction — for task due dates and scheduled messages alike.

See Trigger Dates

Frequently Asked Questions

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, Earnest Money Due Date, Earnest 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. The date itself doesn't reach your calendar, but a task due relative to it syncs like any other task.

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.

Can I make an optional field required?

No. Turning a field on puts it on every transaction, but there's no setting that makes filling it in mandatory. A checklist task with a due date is how offices get it filled in. See Get Agents to Fill In the Fields You Need.