Track a Detail Pipeline Has No Field For

Last Modified on 09/04/2026 11:15 am EDT

County, financing type, offer of compensation, the reference number your accounting system uses — when the detail you need isn't a field yet, you can build one that behaves like Pipeline shipped it.

Introduction

Every office tracks something the next one doesn't. A custom field is Pipeline's answer to that, and the important thing to know about it is that it isn't a second-class field: once it exists it sits on the transaction, it's searchable, it becomes its own column in every downloaded spreadsheet, it flows through Zapier, it autofills into messages, and it prints on the coversheet.

Before you build one, though, it's worth checking that a field is what you actually want. Some of the things offices try to put in a custom field have a better home somewhere else, and a few minutes spent on that question saves a year of awkward data.

When to Use This

- You need to track something Pipeline has no field for — offer of compensation, mortgage lender, condition removal date, parcel number.
- You're typing the same thing into More Info on every transaction and want it in its own column instead.
- You need to search or report on a detail that currently lives in free text.
- Your accountant, your MLS, or your state needs a number that isn't anywhere in your spreadsheet download.
- A rule change added a new figure to every deal and there's nowhere to put it.

Why This Beats a Note in More Info

The reflex is to type it into More Info, and for a long time that was the only option — plenty of offices still have a decade of referral sources buried in that box. It works, in the sense that the text is there and searchable. What it can't do is come back out as a column you can sort, subtotal, or hand to an accountant.

A custom field can. That's the whole difference: More Info holds a note about the deal, a field holds a value *of* the deal, and only the second one shows up in your reports as data.

1. Decide Whether It's Really a Field

Three quick checks before you build anything.

Is it a person? Then it's a Contact, not a field. Lenders, escrow officers, attorneys, inspectors — put them on the transaction as Contacts, where they carry a role, an email, and a phone number, and where the auto-suggestions save you retyping them on the next deal.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

Is it an identifier from another system? Then it belongs with the MLS number. The MLS or Transaction Number field takes several numbers separated by a forward slash — an MLS number, a state-required transaction number, your accounting system's reference — and Pipeline splits them into their own columns on your downloaded spreadsheet.

Every transaction carries identifying numbers that tell it apart from every other one in your account.

See Transaction ID

Is it anything else? Then it's a field. Keep going.

2. Build the Custom Field

A master admin adds it once, in your company settings, and from that point it's on every transaction in the account. Name it the way you'd want to read it in a spreadsheet header, because that's exactly where it'll show up.

Build your own transaction fields to capture the data Pipeline doesn't already track.

Build the fields your office needs, and Pipeline treats them like every other transaction detail.

See Custom Fields

> Custom fields are capped per account, so spend them on the details you genuinely report on. Anything you just want written down is better served by the prompt fields in the next step.

3. Use the Prompt Fields for Everything Else

Not every detail earns a column. When you mostly need agents to *remember* to write something down, set a default value on the free-text fields instead: type `Financing Type:` or `County:` as the default and it appears pre-filled on every new transaction as a visible prompt.

Which of the three you choose decides who sees it. **More Info** is visible to agents, **Admin Info** is staff-only, and **Commission Summary** sits with the money.

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

See Default Field Values

4. Pull the Data Back Out

This is the payoff, and it's worth knowing all the exits before you decide how to name the field.

Every custom field becomes its own column in downloaded Transaction Spreadsheets, which is how most offices get the data to an accountant or a state form. Each one is searchable, so a parcel number or an internal file number is as findable as a street address. Each one can be dropped into a message template as an autofill tag, printed on the coversheet, and sent through Zapier to whatever comes next.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Global Search

> There's no way to make a field required. If agents have to fill one in, the reliable prompt is a checklist task — *Add Buyer Broker Compensation*, due the day the transaction is created — which chases them until it's checked off. See Checklist Templates.