Pipeline custom fields and layouts

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Tags: Keap-Pro   Keap-Max   Keap-Ultimate

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Pipeline Custom Fields & Layouts allow you to quickly add custom fields for use across multiple Pipelines, and customize the layout of fields on a per-pipeline basis.

Common Use Cases

- Sales Pipeline - Capture complex sales details & optimize sales view
- Service Management/Fulfillment - Track complicated service or fulfillment management using Pipelines with custom fields and layouts to capture and track relevant details
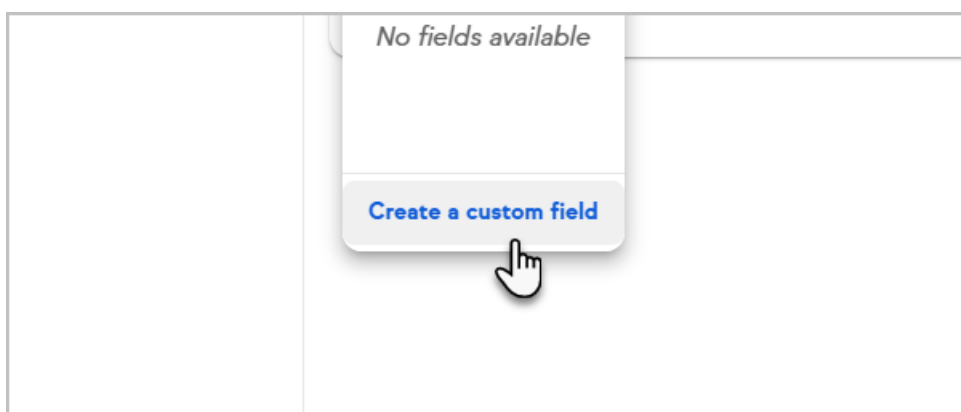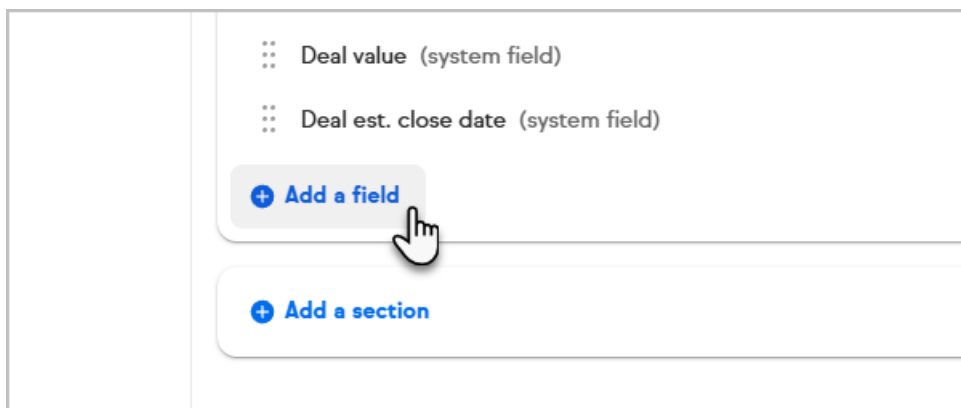
Creating Custom Fields

1. From any pipeline, click on a deal, and click the **Manage fields and layout** button at the bottom-right of the modal window. This will open Custom fields and layout settings.
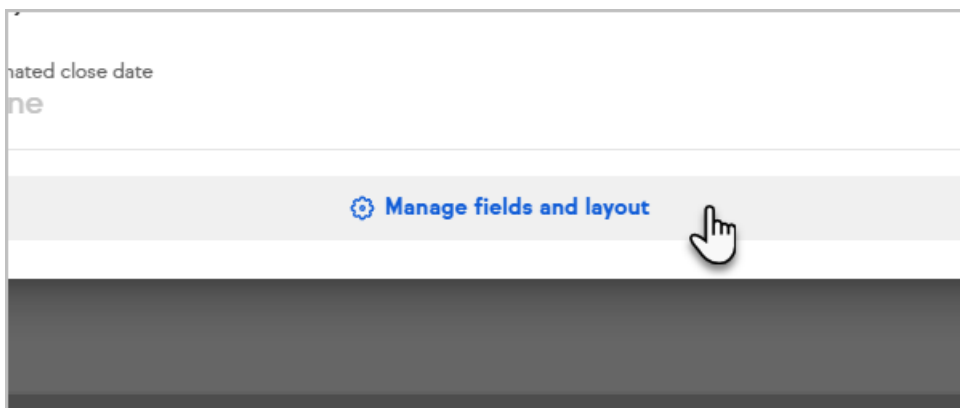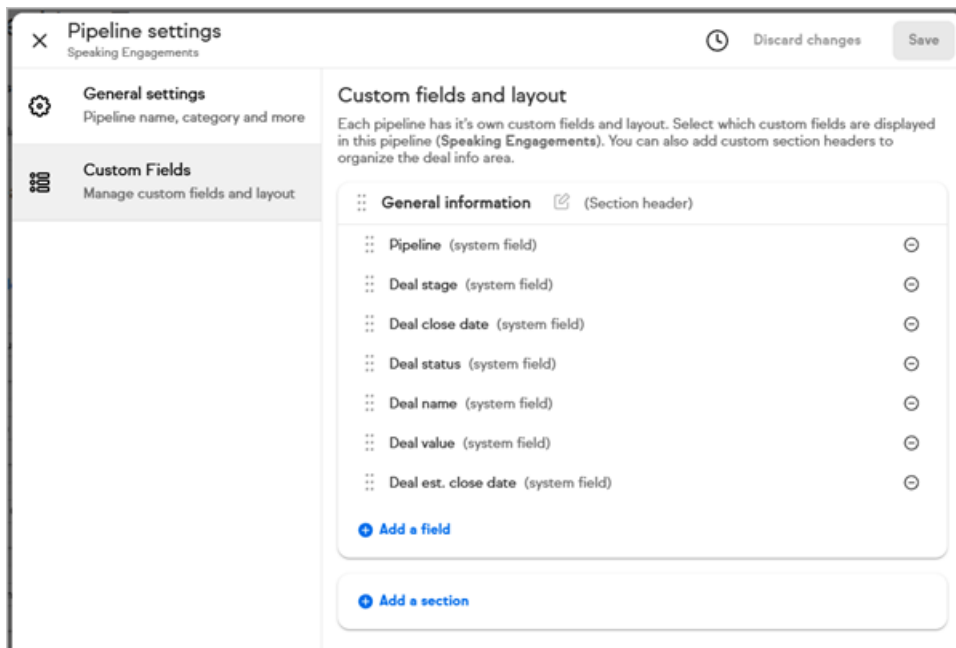
2. From there, click **Add a field** and **Create a custom field** from the bottom of the drop down, which will enable you to create a new custom field.

3. Once you've clicked to create a custom field, you can enter a field label, which will become the field name, and select the type of field you wish to create.

Create pipeline custom field

Field info

Field label*

Property Value

Field type

Currency

More field settings ⌄

4. The following field types are available for use:

    a. Text

    b. Currency

    c. Dropdown

    d. Date

    e. Date & Time

    f. Day of Week

    g. Number

    h. Whole Number

    i. Dropdown (single-select, multi-select)

    j. Email

    k. Month

    l. Percent

    m. Phone

    n. Radio buttons

    o. Text

    p. Text Area

    q. Time

   r. Website

    s. Year

    t. Yes/No

5. Once you've finished, click **Create field** and the new field will be added to the layout section specified. Once created, a custom field can be added to the layout of any pipeline.
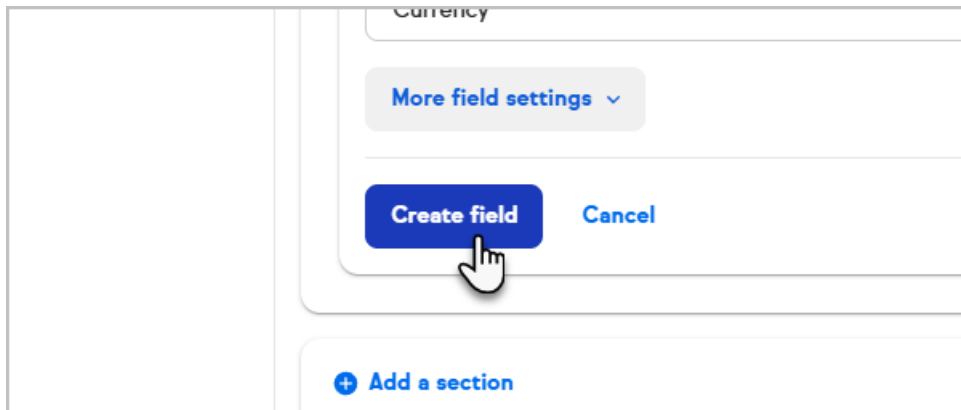

Managing the Layout

Layouts can be rearranged on a per-pipeline basis. While fields are shared across all pipelines, Layouts allow you to control on a per-pipeline basis which fields are visible, the header sections they are organized within, and the ordering of the fields within those sections, as well as the ordering of the sections themselves.

1. To add a new section, click the **Add a section** button at the bottom of the page.
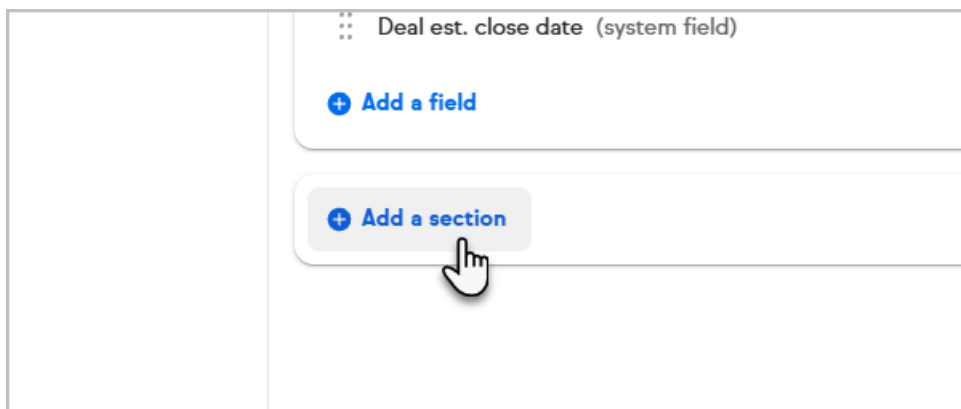
2. Type a name for your new section and hit the return key or click away to save it.
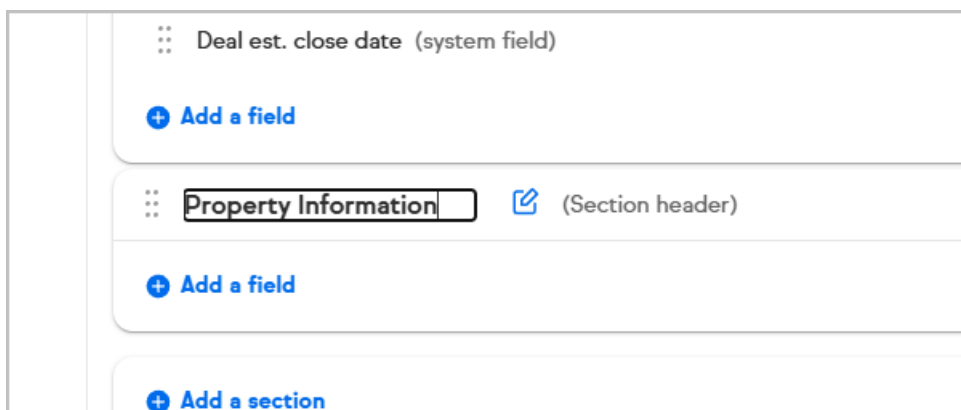
3. You can now begin adding fields to your new section.

4. Click **Add a field** within the desired section, and select the field you wish to add from the list of

available fields in the dropdown. If the field you wish to add doesn't yet exist, please follow the process for **Creating custom fields** above.

5. Hover over the field you wish to include and click, this will add it to the bottom of the current section.
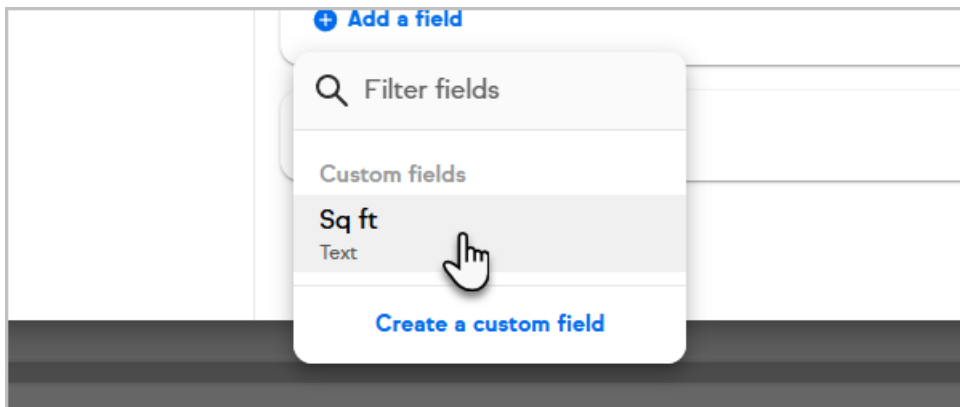
6. To remove a field from a current section, simply click the **-** button on the right hand side of the field that you wish to remove. *Note that this will not delete the custom field, but simply remove it from this section/layout.*

7. To rearrange the order of the fields within a section, simply hover over the drag handle icon located to the left of the field in question and hold click while moving the field to the desired order and release to place it in the new order of the section.
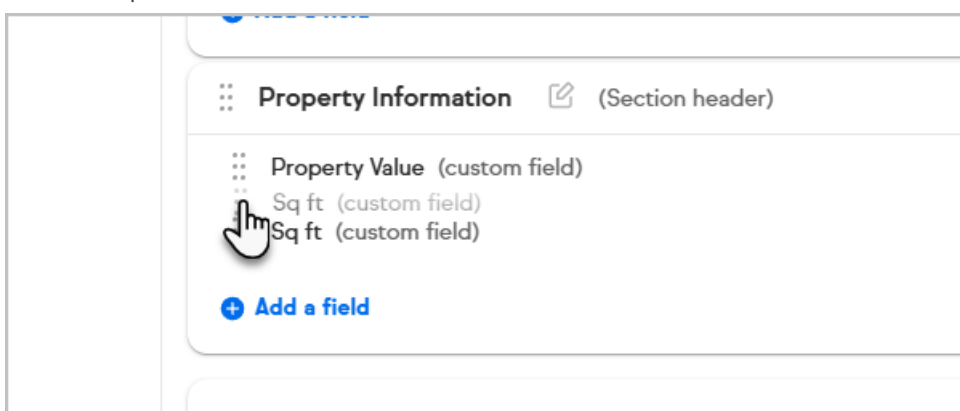
8. To move a field from one section to another, simply perform the above step while dragging the field and releasing it within a different section.

9. To rearrange the order of different sections within a layout, simply hover over the drag handle icon

located to the left of the section header in question and hold click while moving the section to the desired order and release to place it in the new order of the layout.

10. When finished, click **Save** and close the Pipeline settings modal which will return you to the pipeline in question. Note that clicking on a deal will now reflect the updated layout.

FAQs

Q: Are Pipeline custom fields tied to a specific pipeline?
A: No. Any Pipeline custom field you create will be available for use across any pipeline you've created.

Q: Can I create a unique layout for each Pipeline?
A: Yes. Each pipeline can have it's own layout, so even though fields are available across all pipelines, they won't be visible for your users unless you wish them to be.

Q: Is there a limit to how many custom fields can be created?
A: Yes. 150 custom fields can be created across all pipelines.

Q: Can I filter deals in the pipeline board or list view based on data contained in the custom fields?
A: Coming soon!

Q: Can I merge data contained in pipeline custom fields into email and text messages?
A: Coming soon!