Search, Sort, and Download

SUMMARY

Utilize the search options outlined in this article to quickly drill down to the transactions, tasks, and docs you need to work on.

IN TH	HISARTICLE
	Introduction
	Who Can Do This?
	How To
	Search Transactions
	Search Active Transactions from Home Page
	Power Search Transactions
	Search Multiple Fields at Once (Address, MLS, Agent, Seller, Buyer)
	Search Within a Specific Field
	On-Page Searching
	Search
	More Search Options
	Sort
	Download a Transaction Spreadsheet Report
	Save a Custom Search/Sort as a Shortcut
	Search Tasks
	Search Unassigned and Unreviewed Docs
	On-Page Searching
	Search
	Filter
	Sort
	Save a Custom Search/Sort as a Shortcut
	General On-Page Searching

Who, What, Where - The Many Ways to Search in PP Quick Access Build Custom Reports

Introduction

Just as important as finding the information you're looking for is *excluding* the information you *don't* need to see. Learning to quickly find the exact transactions, tasks, or docs you need to manage in Pipeline is one of the best ways to get in and out of the system quickly with minimal distraction.

Popular searches supported in Pipeline include:

- Power Search by Agent Name to find all transactions for a specific agent (e.g., Find transactions where agent last name is "Lane" while excluding transactions with Transaction Name that contains "Lane")
- Power Search by Transaction Name to search for specific text within a Transaction Name only (e.g., Find Transaction names that contains "Jackson" while excluding transactions with agents whose name is "Jackson")
- Power Search by Buyer or Seller Name to search transactions by Buyer or Seller name
- Filter Tasks by Due Date (e.g., to view only tasks due today)
- Power Search within a specific field and use the Transactions Page Search Options to combine search criteria in filter sections (e.g., Find all transactions for agent smithson that are closing this week, are Residential properties, and don't have commissions entered)
- Filter Unreviewed Docs by Doc Label to search for docs with a particular doc label (e.g., Find docs with a Doc Label of "Needs Review" while reviewing docs)
- Filter Tasks by Agent Checked to find all tasks agents have indicated they have completed
- Filter Tasks by Your @ Tasks to find all tasks highlighted or assigned to me (where I am @mentioned)

Who Can Do This?

All Pipeline users can search for transactions, tasks, and docs they have access to. Only admin users have the ability to download transaction spreadsheets.

How To

Search Transactions

Each of Pipeline's transaction search options can be useful in different ways. Whenever you search or sort transactions, you'll have the option to view the resulting list, download it as a spreadsheet, and/or save the search criteria as a shortcut for quick access to it later.

Search Active Transactions from Home Page

On the Home page, type any part of a transaction's name into the Search Active Transactions field to

instantly find matching active transactions. Learn how to Search Active Transactions \rightarrow

Paperclip Realty	Announcement from your admin: All staff are bold to attend this week's staff meeting. Anyone not in attendance working from the hallway going forward and will be <i>prohibited</i> from eating cup break room. Visit <u>www.nocupcakes.com</u> for more info or click <u>No Cupcakes 4</u> .	Oct 15 e will begin pcakes in the <u>you!</u> Hic	le Annour	ncement ^
- My Shortcuts	Search Active Transactions			
+ Recently Viewed	Q 432			
Admin & Support Rajesh Dhawan rajesh+devppl@paperlesspipeline.com 555-555-5555	 4321 Michael Agent Street 14329 Big Springs Dr. Dallas, TX 77555 1234 Twisted Pear Lane, West Montgomery AL 43224 			

Power Search Transactions

From anywhere in Pipeline, use the transaction Power Search to either search within multiple fields at once (*Address, MLS, Agent, Seller,* and *Buyer*) or to search within a specific transaction field.

Search Multiple Fields at Once (Address, MLS, Agent, Seller, and Buyer)

When you enter your search term in Power Search, the system will search each transaction's *Address*, *MLS*, *Agent*, *Seller*, and *Buyer* field then return a list of transactions where your search term exists in any of those fields.

To search across multiple fields at once:

1 Enter all or part of your search term into the Power Search field in the upper-left corner of any page in Pipeline.

smith	×Q	Transactions Tasks U	nassigned Unreviewed Reports Reference	+ Add Transaction ? Help 🐵 Hollis H.
Paperclip Realty			Announcement from your admin: All staff are bal d to attend this week's staff meeting. Anyone not in attend working from the hallway going forward and will be <i>prohibited</i> from eating break room. Visit <u>www.nocupcakes.com</u> for more info or click <u>No Cupcakes</u>	Oct 15 ance will begin g cupcakes in the <u>s 4 youl</u> Hide Announcement ^
- My Shortcuts			Search Active Transactions	
+ Recently Viewed			Q	

2 Click [Search] or press "Enter/Return" on your keyboard. A list of transactions where your search term exists in the Address, MLS, Agent, Seller, and Buyer fields will be displayed in the resulting list.

3 Once your resulting list of transactions appears, if desired, use the search options on the *Transactions* page to further filter your results.

Search Within a Specific Field

Use the field-specific search options to search for transactions that contain information within a specific field.

To search within a specific transaction field:

1 From the upper-left corner of any page in Pipeline, **click inside the Power Search box to** display the search options.

2 Select the transaction field you want to search within, then enter your search criteria. For example, to search within the Contact field, select [Contact] then enter part of a contact's last name or email address.

contact:smith XQ	💮 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis
search options <u>unwritectit sourches i</u> name: transaction for dee-label: doc label id: transaction id mis: MLS number	Announcement from your admin: Oct 15 All staff are bold to attend this week's staff meeting. Anyone not in attendance will begin withing from the halfway going florward and will be <i>prohibited</i> from eating upcackes in the break room. Visit <u>www.nocupcakes.com</u> for more info or click <u>No Cupcakes 4 youl</u> Hide Announcement ~
Buyer: Dayer mome selfer: seler nome be: location nome be: location nome be: nome into text definition of the self definition of the self definition of the self of the self definition of the self of the self selfing-opert. cogen nome or email selfing-opert. cogen nome or email selfing-oper. costate (core) op opent	Search Active Transactions
deci: doc same centect: contact name or email creater: creator name or email lead-source: lead source name is zip code research within a specific field, click on option above, type your search term, then press frain. Irransactions remaining 79	0 Tasks Due Today → 0 11 Unassigned Documents → 0 0 Documents →

3 Click the Search icon or press "Enter/Return" on your keyboard. A list of transactions where your search term exists within the field you specified will be displayed in the resulting list.

4 Once your resulting list of transactions appears, if desired, use the search options on the Transactions page to further filter your results.

On-Page Searching

On the Transactions page, quickly search for transactions by multiple fields at once (Address, MLS, Agent, Seller, and Buyer) or use the powerful advanced search options to refine your list of transactions by certain transaction fields and stats.

Search

Use the search field on the Transactions page to search for transactions by Address, MLS, Agent, Seller, and Buyer.

To run a quick search for transactions by multiple fields at once:



1 Click [Transactions] from the top menu.



2 In the search box at the top of the page, **enter all or part of your search term**.

3 Click the green [Search] icon. The system will search each transaction's Address, MLS, Agent, Seller, and Buyer fields then return a list of transactions where your search term exists in any of those fields.

Search address, mls, agent, seller, buyer	C Iransactions Tasks Unassigned	Unreviewed Reports Reference		+ Add Transaction ? He	elp 💮 Hollis H.
Add Transaction	Transactions 1-50 of a derive transaction	ns. <u>View all →</u>			
Import Transactions	Broadway Q Search - Sort -	Columns - Download -		« First < Prev	Next > Last »
- My Shortcuts	1 Transaction ≑	Status	Complete Agents	Location	Close Date ≑
Overdue Admin Tasks	1 2024 East Wesley Street (#2)	L+B Commercial Active	0/48	Austin, Elsewhere	
	1111 Trampoline Lane	Condo/Townhouse Active	3/6	Austin, TX	
① Updated This Week	🕕 1111 Kirkland Highway Northeast Suite 531, Wilmin	Condo/Townhouse Active	4/6	Austin, TX	
	1224 Baseport May (#2)	Commercial Active	2/2	Austin TV	

More Search Options

The *Transactions* page offers additional search options to help you refine your transactions search. Use the search options to adjust (and optionally, save) your default list of transactions or to finetune the results of other searches.

To refine your transactions search:

1 From the top of the *Transactions* page, **click** [Search] to expand the search area.

🔊 Search address, mis, agent, seller, buyer 🛛 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🕲 Hollis H.										
Add Transaction	Transactions 1-50 of 332 active to reactions. View all →									
Import Transactions	Search address, mls, agen 🔍 Search 🔻 Sort 👻 Columns 💌 Download	i •	«First < Prev Next > Last »							
- My Shortcuts	Transaction \$\2012	Status	Complete Agents Location Close Date ≑							
Admin Tasks	1223 West Lane, Landers WY 12223 (#2)	L Commercial Active	33/79 🔗 Austin, TX							
	25970 Thistletown Ct, Menifee, CA 92584	Condo/Townhouse Active	4/6 Austin, TX							
- Shortcuts	1111 Kirkland Highway Northeast Suite 531, Wilmington DE, 19891	Condo/Townhouse Active	4/6 Austin, TX							
With Incomplete Checklists	476 Passport Way (#2)	Commercial Active	3/3 Austin, TX							
Overdue Closing	1234 Prosper Lane	Commercial Active	8/8 Austin, TX							

2 Select or enter all desired search criteria for any field in the shaded search area.

🔊 [search address, mis, agent, seller, buyer 🛛 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis H.										
Add Transaction	Transactions 1-50 of 137 mc	atching tr	ansactions. View all active transactions -	-9						
Import Transactions	Search address, mls, age 📿 Search	▲ So	rt 🕶 Columns 👻 Download 🕶	Add Shorto	ut		« Firs	t < Prev	Next > Last »	
- My Shortcuts	Status	Search by Date Range			Side			Location		
Admin Tasks	Listed	X ▼ Choose a Date Type →			✓ Any Side →			 Any Location → 		
	Label		Commissions		Checklist Status					
- Shortcuts	Any Label →	•	Commissions →	•	Any Checklist \rightarrow		·	Sea	rch	
With Incomplete Checklists	Transaction				Status Cor	mplete /	gents	Location	Close Date 🌲	
Overdue Closing	1234 Passport Way	al Listed	0/48		Austin, TX	Oct 04, 2021				
Closing in 30 days	8154 Oakley Avenue, Topeka, KS 666	304		Residenti	al Listed	3/6		Austin, TX		

3 Click the green [Search] button. The matching transactions will be displayed in the resulting list.

🔊 Search address, mis, agent, seller, buyer 🛛 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis H.										
Add Transaction	Transactions 1-50 of 137 m	atching t	ransactions. View all active transactions							
Import Transactions	Search address, mis, age Q Search	Sc	ort • Columns • Download •	Add Shortcut		«First < Prev Next > Last »				
- My Shortcuts	Status		Search by Date Range	Side		Location				
	Listed	× -	Choose a Date Type →	 Any Side → 		Any Location → ▼				
	Label		Commissions	Checklist Status						
- Shortcuts	Any Label →	*	Commissions →	 Any Checklist - 	→ *	Search				
With Incomplete Checklists	Transaction [‡]			Status	Complete A	gents Location Close Date ≑				
Overdue Closing	🕕 1234 Passport Way			Commercial Listed	0/48	Austin, TX Oct 04, 2021				
Closing in 30 days	🕕 8154 Oakley Avenue, Topeka, KS 66		Residential Listed	3/6	Austin, TX					

Use the sort option to sort (and optionally, save) your default list of transactions or to fine-tune the results of other searches.

1 From the top of the *Transactions* page, **click the [Sort] tab**.

Search address, mls, agent, seller, buy	ار <u>Transactions</u> Tasks U	nassię	gned Unreviewed R	epor	ts Referer	ice		-	+ Add T	ransaction	? Help 🔞	Hollis H.
Add Transaction	Transactions 1-50 of 113 ma	ransactions 1-50 of 113 mate on transactions. View all active transactions										
Import Transactions	Search address, mis, age Q Search	▲ s	iort 🔺 Columns 👻	Dov	vnload 🔻	Add Shortc	ut				Prev Next >	Last »
- My Shortcuts	Status	Т	fransaction Name				Side			Location		
	Listing	×	Close Date			-	Listing Side		X -	Any Loco	ation \rightarrow	*
	Label	A	Added On				Checklist Stat	us				
Ц Pending & Needs Review	Any Label →	L	Jpdated On			Ψ.	Any Checkli	st →	+		Search	
Updated This Week		L	isted On									
	Transaction [‡]	A	Accepted On		tatus		Complete	Agents	Locatio	'n	Close	Date ≑
- Shortcuts	Third Latest Status Change	S	Status Changed On		ristian test	status EDIT		68	Austin,	тх	Mar 26	6, 2014
With Incomplete Checklists	Relative Date Testing 060321	- 0	mported On		isted		0/15	23	Austin,	Elsewhere	Jun 04	1, 2021
Overdue Closing	🕦 101 June Road, Memphis, TN, 38104	E	Expires On		isted		9/101	<u>81</u>	Austin,	Elsewhere	Jul 10,	2020

2 Select your desired sort field. The resulting list of transactions will be sorted by the field you selected. If the sort field you selected wasn't already visible on the Transactions page, it will be added in place of the Close Date once you execute the sort.

Use the sort option to display a transaction field that isn't available on the Transactions page by default. When you sort by a field that isn't already visible on the *Transactions* page, your selected sort field will replace the Close Date.

Download a Spreadsheet Report

After you search or sort transactions, you can optionally download the resulting list as a spreadsheet.

To download a spreadsheet of your transaction search results:

1 Once you've searched and/or sorted, click [Download].

Search address, mls, agent, seller, buyer	् ि <u>Transactions</u> Tasks ।	Jnassig	ned Unreviewed Reports Referenc	e		-	- Add Tro	ansaction ? Help	Hollis H.
Add Transaction	Transactions 30 matching transactions. View all active to quactions								
Import Transactions	Search address, mis, age Q Search	▲ So	rt 👻 Columns 👻 Download 👻 🖉	Add Shorto	ut				
- My Shortcuts	Status		Search by Date Range		Side			Location	
	Listing	Х-	Choose a Date Type \rightarrow	-	Listing Side		ж-	Any Location \rightarrow	-
	Label		Commissions		Checklist Statu	IS			
1 Pending & Needs Review	Residential	Х-	Commissions →	-	Any Checklist	t→	-	Search	
① Updated This Week									
	Transaction [‡]		Status		Complete	Agents	Location	Clo	se Date 🌲
- Shortcuts	1234 August Street		L Residential Listed		0/35	2	Austin, E	lsewhere	
With Incomplete Checklists	9989 Oakley Ave., Topeka, KS 66604	ļ	L Residential Listed		0/22	25	Austin, T	X Dec	31, 2020

2 Select [Include only displayed columns] to generate a spreadsheet of results that only includes the columns displayed on the Transactions page.

Or select [Include all transaction columns] to generate a spreadsheet of results that includes all transaction fields.

Search address, mis, agent, seller, buyer Q m Transactions Tasks Unreviewed Reports Reference + Add Transaction ? Help Help Help											
Add Transaction	Transactions 30 matching	transact	ions. View all active trans	actions \rightarrow	1						
Import Transactions	Search address, mis, age 🔍 Search	▲ Sc	ort 🔻 Columns 👻	Download 🔺 Add Shorto	ave.						
- My Shortcuts	Status		Search by Date Ran	Include only displayed	Side			Location			
	Listing	ж-	Choose a Date Ty	Columns	Listing 2		X -	Any Location	→ -		
	Label		Commissions	columns	Chr affist Stat	us					
📮 Pending & Needs Review	Residential	Х-	Commissions →	Download Search	my Checkli	st →	-	Sec	rch		
① Updated This Week											
	Transaction [‡]			Status	Complete	Agents	Location	1	Close Date 🌲		
- Shortcuts	1234 August Street		L Residenti	al Listed	0/35		Austin, E	Isewhere			
With Incomplete Checklists	9989 Oakley Ave., Topeka, KS 66604	4	L Residenti	al Listed	0/22	23	Austin, T	х	Dec 31, 2020		

3 Click [Download Search].

Hidden columns will not be included in the download when selecting "Include only displayed columns". Learn more about showing/hiding columns →

This section describes downloading transaction lists. Learn more about downloading individual transactions here \rightarrow

Save a Custom Search/Shortcut

Once you've run your desired search and/or sort on the *Transactions* page, you can optionally save the search criteria to your *My Shortcuts* menu for quick access to it later. This is most useful for searches/sorts you may run regularly.

Learn how to Save Transaction Shortcuts →

Search address, mis, agent, seller, buyer 🔍 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis H.											
Add Transaction	Fransactions 5 matching transactions. View all active transactions										
Import Transactions	Search address, mis, age 🔍 Search 🔺	Sort 👻	Columns 👻 Download 👻	Add Shortd	ut						
- My Shortcuts	Status	Sec	arching by Updated On	Side		Location					
To and downtown the starts to this list	Any Status →	▼ Th	is Week	- X	Any Side \rightarrow	*	Any Location \rightarrow	-			
run a search and / or sort, then click	Label	Cor	mmissions		Checklist Status						
the "Add Shortcut" button.	Any Label →	• Co	ommissions →	-	Any Checklist	•	Search				
- Shortcuts	Transaction ¹		Status		Complete Ag	ents Locatio	n Cle	ose Date 🌲			
With Incomplete Checklists	🕕 2024 East Wesley Street (#2)		L+B Commercial Active		0/48	Austin,	Elsewhere				
Overdue Closing	1111 Trampoline Lane		Condo/Townhouse Active		3/6	Austin,	тх				

Search Tasks

The Tasks page allows you to search and filter tasks to focus on the exact tasks you need to see.

Learn how to search, filter, and sort tasks on the Tasks Page →

Search Unassigned & Unreviewed Docs

Search and filter unassigned and unreviewed docs to focus on the docs that need your action.

On-Page Searching

Search

To search for unassigned or unreviewed docs:

1 Click [Unassigned] or [Unreviewed] from the top menu.

2 Click [Search], then enter all or part of your search term into the search field. The system will search for your term within the doc name, the transaction name, and the uploader name.

🔊 Search address, mis, agent, seiler, buyer 🛛 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis H.									
Unreviewed Docs Unreviewed Docs 1-50 of 1700 docs. 2354 Unentered Docs Review and verify the following documents in accordance with your company's policies.									
- My Shortcuts	Q Search V Filter Sort -	Columns 👻						rst < Prev N	ext ≻ Last ≫
🛛 Admin Tasks 🛛 🕘 🛶	Listing Agreement Search Docs								
- Unreviewed CDAs	🚯 Unreviewed Doc Name 🗘 🛛 T	ransaction ‡	Status 🌲	Location \updownarrow	Agents	Assigned 🗘	Closing \updownarrow	Reviewed	Entered
150 Upreviewed CDAs	() Missir 5 <acceptance -="" cal="" l<="" th=""><th>atest (#8) (Listing) (Co</th><th>Contingent</th><th>Austin, TX</th><th>~</th><th>Oct 29, 2021</th><th></th><th></th><th></th></acceptance>	atest (#8) (Listing) (Co	Contingent	Austin, TX	~	Oct 29, 2021			
154 Upentered CDAs	Seller's Disclosure	23 Main St., Austin, TX 123	Listed	Austin, TX	8	Aug 24, 2021	Jun 15, 2020		
134 UNENTERED CDA3	Listing Agreement	23 Main St., Austin, TX 123	Listed	Austin, TX	8	Aug 24, 2021	Jun 15, 2020		

3 Click [Search Docs]. The docs that match your search term will be displayed in the resulting list.

Search address, mls, agent, seller, buyer	् ि Transactions	Tasks Unassigned <u>Unrevi</u>	ewed Report	s Reference			+ Add Trans	action ? He	p 🛞 Hollis H.
1700 Unreviewed Docs 2354 Unentered Docs - My Shortcuts	Unreviewed Doc Review and verify the following Q Search	S 1-50 of 1700 docs. documents in accordance Columns 💌	with your con	npany's policie	s.		« F	irst < Prev N	lext > Last »
Admin Tasks	Listing Agreement Search Docs								
- Unreviewed CDAs	🚯 Unreviewed Doc Name 🗘	Transaction ≑	Status 🌲	Location $\ensuremath{\hat{\mp}}$	Agents	💻 Assigned 🔅	Closing ≑	Reviewed	Entered
150 Upreviewed CDAs	() Missir) 5 <acceptance -="" cal<="" th=""><th>Latest (#8) (Listing) (Co</th><th>Contingent</th><th>Austin, TX</th><th>00</th><th>Oct 29, 2021</th><th></th><th></th><th></th></acceptance>	Latest (#8) (Listing) (Co	Contingent	Austin, TX	00	Oct 29, 2021			
154 Upentered CDAs	Seller's Disclosure	123 Main St., Austin, TX 123	Listed	Austin, TX	0	Aug 24, 2021	Jun 15, 2020		
Ide Unentered CDAs	Listing Agreement	123 Main St., Austin, TX 123	Listed	Austin, TX	2	Aug 24, 2021	Jun 15, 2020		

Filter

To filter your list of unassigned or unreviewed docs:

1 Click [Unassigned] or [Unreviewed] from the top menu.

2 Click [Filter], then select your desired filter options. Combine any of the available filters for a refined, targeted search.

Search address, mis, agent, seller, buyer 🔍 🍙 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis H.								
1700 Unreviewed Docs 2354 Unentered Docs	Unreviewed Docs 1-50 of 17 view and verify the following documents	00 docs. in accordance with your comp	any's policies.					
- My Shortcuts	Q Search ⊽Filter Sort ▼ Columns	*		« F	irst < Prev Nex	d ≻ Last ≫		
🗍 Admin Tasks	Location Any Location →	Doc Label Any Label →		Status ▼ Any Status →		÷		
- Unreviewed CDAs	Closing Date Range (m/d/yyyy) start date 🛗 end date	8		Filt	ter Docs			
150 Unreviewed CDAs	Unreviewed Doc Name Transaction	n ≎ Status ≎ I	Location 🗘 Agents	Assigned 🗘 Closing 🗘	Reviewed	Entered		
	Missir 5 <acceptance (#8)<="" -="" cal="" latest="" th=""><th>(Listing) (Co Contingent</th><th>Austin, TX</th><th>Oct 29, 2021</th><th></th><th></th></acceptance>	(Listing) (Co Contingent	Austin, TX	Oct 29, 2021				
+ Recently Viewed	Seller's Disclosure 123 Main St.,	Austin, TX 123 Listed	Austin, TX 🔗 🛛	Aug 24, 2021 Jun 15, 2020				
+ Pacent Lookune	Listing Agreement 123 Main St.,	Austin, TX 123 Listed	Austin, TX 🔗 🛛	Aug 24, 2021 Jun 15, 2020				

3 Click [Filter Results]. The docs that match your filter criteria will be displayed in the resulting

list.

🔊 Search address, mit, agent, seller, buyer 🔲 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis H.								
1700 Unreviewed Docs	Unreviewed Docs 1-50 of 170	0 docs. n accordance with vour con	npany's policies.					
- My Shortcuts	Q Search Filter Sort - Columns	•			«First < Prev Ne	ext > Last »		
🗋 Admin Tasks	Location →	Doc Label → Any Label →		Status ▼ Any Status →		-		
- Unreviewed CDAs	Closing Date Range (m/d/yyyy) start date 💾 end date	8			Filter Docs			
150 Unreviewed CDAs 154 Unentered CDAs	Unreviewed Doc Name Transaction	Status	Location \bigcirc	Agents 🥃 Assigned 🗘 Closing 🗘	Reviewed	Entered		
+ Recently Viewed	Missir 5 <acceptance (#8)="" -="" 123="" cal="" disclosure="" latest="" main="" seller's="" st.,<="" th=""><th>(Listing) (Co Contingent Austin, TX 123 Listed</th><th>Austin, TX Austin, TX</th><th>Oct 29, 2021 Aug 24, 2021 Jun 15, 202</th><th>0</th><th></th></acceptance>	(Listing) (Co Contingent Austin, TX 123 Listed	Austin, TX Austin, TX	Oct 29, 2021 Aug 24, 2021 Jun 15, 202	0			
+ Pecent Lookune	Listing Agreement 123 Main St.,	Austin, TX 123 Listed	Austin, TX	Aug 24, 2021 Jun 15, 202	0	Ō		

Sort

To sort your list of unassigned or unreviewed docs:

1 Click [Unassigned] or [Unreviewed] from the top menu.

2 Click [Sort], then select your desired sort field. The resulting list of docs will be sorted by the field you selected.

Search address, mis, agent, seller, buyer	Q 슈 Transactions Tasks Unassig	ned <u>Unreviewed</u> Reports Referen	ice		+ Add Trans	action ? Help 🛞 He
1706 Unreviewed Docs 2347 Unentered Docs - My Shortcuts	Unreviewed Docs 1-50 of 1706 d Review and vore the following documents in c Q Search Y Filter Sort Columns •	acs. accordance with your company's po	licies.			Prev Next > Last >>
Admin Tasks	Unreviewed Doc Nc Doc Name Transaction Name	Status 🗘	Location 🗘	Agents Assigned \$	Closing © Rev	riewed Entered
- Unreviewed CDAs	A true specimen of Status	wn Ct, Menifee, Active	Austin, TX	Nov 10, 2021	501 H4, 2020	
150 Unreviewed CDAs	Missir A great doci	wn Ct, Menifee, Active	Austin, TX	Nov 10, 2021		
154 Unentered CDAs	Purple 6 <acceptane closing<="" th=""><th>wn Ct, Menifee, Active</th><th>Austin, TX</th><th>Nov 10, 2021</th><th></th><th></th></acceptane>	wn Ct, Menifee, Active	Austin, TX	Nov 10, 2021		
+ Recently Viewed	Four: A best stand Label Need <a 25970="" doc="" great="" name="" th="" this<="" with=""><th>iwn Ct, Menifee, Active stletown Ct, Menifee, Active</th><th>Austin, TX Austin, TX</th><th> Nov 9, 2021 Nov 9, 2021 </th><th></th><th></th>	iwn Ct, Menifee, Active stletown Ct, Menifee, Active	Austin, TX Austin, TX	 Nov 9, 2021 Nov 9, 2021 		

Save a Custom Search/Sort as a Shortcut

Once you've run your desired search, filter, and/or sort on the *Unreviewed* or *Unassigned* page, you can optionally save the search criteria to your *My Shortcuts* menu for quick access to it later. This is most useful for searches/sorts you may run regularly.

Learn how to Save Custom Shortcuts →

search address, mis, agent, seller, buyer 🔍 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference + Add Transaction ? Help 🛞 Hollis H.								
1625 Unreviewed Docs 2249 Unentered Docs	Unreviewed Docs 1-50 of 133 Review and verify the following documents	7 matching docs. <u>View all</u> → in accordance with your company's polic	cies.					
- My Shortcuts	Q Search ∑Filter Sort ▼ Columns	Add Shortcut		rst < Prev Next > Last »				
	Location	Doc Label	Status					
 Unreviewed CDAs 	Any Location →	 Any Label → 	 Pending 	X -				
151 Unreviewed CDAs 155 Unentered CDAs	Closing Date Range (m/d/yyyy) start date end date		Filt	er Docs				
	Unreviewed Doc Name Transaction	n ≑ Status ≑ Location ≑	Agents 🥏 Assigned 🗘 Closing 🖨	Reviewed Entered				
+ Recently Viewed	S1612193389.95 123 Test St, T	Topeka, KS 123 Contingent Austin, TX	🚉 🔍 Feb 1, 2021 Dec 31, 2021					
+ Recent Lookups	Missing Signature on Page 2 - Hollis H. (Oct 6, 2021)							
	Sellers Property Disclosure 5600 Ashwo	orth Road Wes Pending Austin, TX	Lec 8, 2014 Aug 10, 2021					

General On-Page Searching

On any page in Pipeline, user your web browser's inherent search capability to quickly find text.

To find specific text on any Pipeline page:

On a PC, hold down the CTRL key + the F key (Ctrl+F).
 On a Mac, hold down the COMMAND key + the F key (Cmd+F).
 Your browser's search menu will appear.

2 Enter all or part of your search term, then press "Enter/Return" on your keyboard. Your search term will be highlighted wherever it appears on the page.

3 To navigate through each resulting instance of your search term, **use the "Enter/Return" key** on your keyboard or the arrows within your browser's search menu.

Search address, mls, agent, seller, buyer	C Transactions Tasks Unassigned Unreviewed Repo	rts Reference	main 1/4	^ ∨ X ⊚ Hollis H.					
1706 Unreviewed Docs 2347 Unentered Docs	Unreviewed Docs 1-50 of 128 matching docs. View all → Review and verify the following documents in accordance with your company's policies.								
- My Shortcuts	Q Search V Filter Sort ▼ Columns ▼ Add Shortcut		« Fi	rst < Prev Next > Last »					
Admin Tasks	Location Doc Label Dallas, TX X ▼ Any Label →		Status ▼ Any Status →	•					
+ Unreviewed CDAs	Closing Date Range (m/d/yyyy) start date		Filt	er Docs					
+ Recently Viewed	⑧ Unreviewed Doc Name	Location 🗘 Agent	s 💻 Assigned 🗘 Closing 🗘	Reviewed Entered					
+ Recent Lookups	Missir Content Organizati Dallas Temporary (Listing Active Four: Hoa Dallas Temporary (Listing Active	Dallas, TX A Dallas, TX A	 Apr 5, 2021 Mar 24, 2014 Apr 5, 2021 Mar 24, 2014 						
- Recently Updated View all	🚯 Keybox-Authorization-By- Dallas Temporary (Listing Active	Dallas, TX 🦳	Apr 5, 2021 Mar 24, 2014						
8956 Bluebonnet Lane, Austin, TX 7 89 Cimarron Road, Wanethcee WA 5555 Mian 724 Briarcliff Road 11 Briarcliff St (#4), Landers WY 12223 – Recently Created View all	Nomed Exclusions Adden. 5426 May Street, Dallas, T. Listed Notice To Prospective Bu. 5426 May Street, Dallas, T. Listed Sellers Property Disclosure 5426 May Street, Dallas, T. Listed Inditing Agreement 5426 May Street, Dallas, T. Listed Inamed exclusions adden. 5426 May Street, Dallas, T. Listed Lead Based Point Adden. 5426 May Street, Dallas, T. Listed Keybox authorization by L. 5426 May Street, Dallas, T. Listed Notice To Prospective With the Street Points, S. Listed	Dailas, TX C Dailas, TX C	 May 16, 2019 						
10222021 SSCM Release Test	Notice To Prospective Bu 2/13 Main Street, Dallas, L. Listed Sellers Property Disclosure, 2773 Main Street, Dallas, T., Listed		Apr 18, 2019						
Latest (#8) 1223 West Lane, Landers WY 12223 (1234 Bunker Hill	and a science of the	Dallas, TX A	Apr 18, 2019 Apr 4, 2018						

Pipeline Pro Webinar Recording: Who, What, Where - The Many Ways to Search in Paperless Pipeline I

This session covers both the standard and creative methods of finding what you need in Pipeline.

View more Pipeline Pro Webinars here →

() 13:34

Pipeline Pro Webinar Recording: Quick Access

In this Pipeline Pro Webinar learn several quick ways to access transactions quickly.

View more Pipeline Pro Webinars here →

() 6:29

Pipeline Pro Webinar Recording: Build Custom Reports I

This Pipeline Pro webinar covers building custom reports that pull the exact transactions you need to see. The Advanced Search area allows you to combine search and filter criteria for all the primary transaction fields, including date fields, saving you time by manually excluding unneeded transactions.

View more Pipeline Pro Webinars here →

() 6:57