Save Custom Searches & Sorts as Shortcuts

SUMMARY

Learn how to save and manage shortcuts to your frequently used searches and sorts for transactions, tasks, and unreviewed docs.

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Introduction

My Shortcuts is your personal list of shortcuts that appears on the left menu of your *Home*, *Transactions*, *Tasks*, and *Unreviewed* pages. Creating shortcuts to your frequently used transaction, task, and unreviewed doc searches/sorts gives you quick access to them later. Save custom searches alone, custom sorts alone, or combine searches and sorts to help you view information that's most important to you.

Who Can Do This?

All Pipeline users can save their own frequently used searches and sorts as shortcuts.

How To

Save a Custom Search/Sort as a Shortcut

Transactions

To save a custom transaction shortcut:

1 On the *Transactions* page, run your desired search and/or sort. Learn how to Search and Sort Transactions →

2 When your search results appear, **click [Add Shortcut]** near the top of the page.

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3 Choose an icon to represent your custom search, filter, and/or sort. Name your shortcut. Then click [Save Search].

Add Transaction	Transactions 5 matching t	ransactions. View all active tr	ansactions \rightarrow					
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4 Your custom shortcut will appear on the left menu in the My Shortcuts section.

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5 Use your saved shortcut.

Tasks

To save a custom task shortcut:

1 On the Tasks page, run your desired search, filter, and/or sort. Learn how to Search, Filter, and Sort Tasks →

2 When your search results appear, **click [Add Shortcut]** near the top of the page.

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3 Choose an icon to represent your custom search, filter, and/or sort. Name your shortcut. Then click [Save Search].

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4 Your custom shortcut will appear on the left menu in the *My Shortcuts* section.

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5 Use your saved shortcut.

Unreviewed

To save a custom unreviewed shortcut:



1 On the Unreviewed page, run your desired search, filter, and/or sort. Learn how to Search, Filter, and Sort Unreviewed Docs →



2 When your search results appear, **click [Add Shortcut]** near the top of the page.

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3 Choose an icon to represent your custom search, filter, and/or sort, then name your Shortcut.

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4 Your custom shortcut will appear on the left menu in the My Shortcuts section.

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5 Use your saved shortcut.

Use a Saved Shortcut

To use your saved shortcut:

1 Click a saved shortcut from My Shortcuts to quickly run your custom search and/or sort.

Search address, mis, agent, seller, buyer	् 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference	+ Add Transaction ? Help 🛞 Hollis H.
Paperclip Realty	Announcement from your admin: All staff are bold to attend this week's staff meeting. Anyone not in attendan working from the hollway aging forward and will be prohibited from eating a break room. Visit <u>www.nocupcakes.com</u> for more info or click <u>No.Cupcakes.f</u>	supcakes in the
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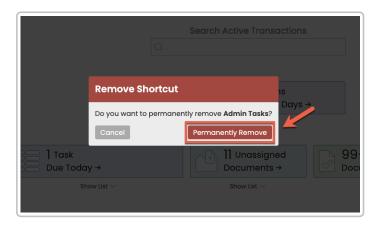
Delete a Saved Shortcut

To delete a saved shortcut:

1 Hover over your custom shortcut and click the red "X" that appears to the right of the shortcut.

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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 prohibited from eating cup break room. Visit <u>www.nocupcakes.com</u> for more info or click <u>No Cupcakes for</u>	cakes in the you!	de Annou	ncement ^
My Shortcuts Overdue Admin Tasks Pending & Needs Review Updated This Week	Search Active Transactions			
+ Recently Viewed Admin & Support Rajesh Dhawan	$\bigcap \ 0 \ \operatorname{Transactions}_{\operatorname{Closing In 7 Days}}$			

2 Click [Permanently Remove] to confirm deletion.



FAQ (Frequently Asked Questions)

Q: How do I rename a custom shortcut?

A: To rename a custom shortcut, delete the saved shortcut and create a new shortcut with your desired new name.