

Search A Transaction's Activity History

Search a transaction's *Activity History* to find specific activity based on the type of update, the person who made it, or the time period. Use the *Transaction History* to verify a particular action or gain insight into what's happened on the transaction since it was created.

Who Can Do This? Agents and admins can view and search the history of activities (relevant to their permissions) on transactions they have access to view.

To search a transaction's activity history:

- 1 Go to a transaction.
- 2 Click [Transaction History] from the left menu.
- 3 Set your desired search options and complete your search

The screenshot shows the 'Activity History for 1234 Bungee Lane' page. The search filters are highlighted with a red box. A red arrow points to the 'Transaction History' menu item in the left sidebar.

Type	Description	Action	Updated By	Updated On
Listing checklist (Residential)		Added	Hollis H.	Dec 8th
Rental Listing		Deleted	Hollis H.	Dec 8th
listing agreement		Reviewed	Hollis H.	Dec 8th
Listing Date added: 2023-12-08		Added	Hollis H.	Dec 8th
Status changed to: Listed (was: Active (...))		Updated	Hollis H.	Dec 8th
Seller Name added: Jim Crouch		Added	Hollis H.	Dec 8th

- Search for specific text by typing it into the Search field.

The screenshot shows the 'Activity History for 1234 Bungee Lane' page with a search for 'jim'. The search field is highlighted with a red box.

Type	Description	Action	Updated By	Updated On
listing agreement	listing agreement emailed to jim@pape...	Emailed	Hollis H.	Dec 8th

- Click [Search] to search by Type, User, and Date Range (described below).

Activity History for 1234 Bungee Lane 28 transaction activities

Email docs and notes to this transaction: 4568212-12343-TX-28163@docs.paperlesspipeline.com

search Search ▲

Type: Select action type(s) User: Select a User Date Range: start date end date Search

Type	Description	Action	Updated By	Updated On
	listing agreement emailed to jim...	Emailed	Hollis H.	Dec 8th

Type

To search by the specific *Action Type(s)*, select the *Type* dropdown menu, then select the *Action Type(s)*.

search Search ▲

Type: Docs User: Select a User Date Range: start date end date Search

Type	Description	Action	Updated By	Updated On
Notes				
Checklists	ed to jim@pap...	Emailed	Hollis H.	Dec 8th
Transaction	o: jim@paperles...	Emailed	Hollis H.	Dec 8th
Jim Crouch		Added	Hollis H.	Dec 8th

- **Docs** includes any activity related to documents, including when they were uploaded, assigned, broken apart, emailed, commented on, etc.
- **Notes** includes any activity related to *Notes* and *Emails*.
- **Checklists** includes any activity related to checklists and tasks, including adding, updating, removing, and checking off tasks.
- **Transactions** includes any activity related to updates made to transaction fields as well as any changes made to *Contacts*.

User

To search by *User*, select the *User* dropdown menu, then select a *User*. Only users who have made updates on the transaction will be available to select.

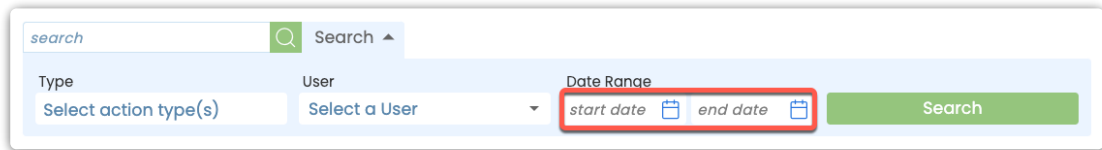
search Search ▲

Type: Select action type(s) User: Select a User Date Range: start date end date Search

Type	Description	Action	Updated By	Updated On
	listing agreement emailed to jim@pap...	Emailed	Hollis H.	Dec 8th

Date Range

To search by a specific *Date Range*, select the *Start Date* and *End Date* for your desired time period.



The image shows a search interface with the following elements:

- A search bar at the top left with the placeholder text "search" and a magnifying glass icon, followed by a "Search" button with a small upward arrow.
- Below the search bar, there are three main sections:
 - Type:** A text input field containing "Select action type(s)".
 - User:** A dropdown menu with the text "Select a User".
 - Date Range:** A section containing two date input fields. The first is labeled "start date" and the second is labeled "end date". Each field has a calendar icon to its right. This entire "Date Range" section is highlighted with a red rectangular border.
- To the right of the "Date Range" section is a green "Search" button.