# **Transaction Flags**

Use Transaction Flags to easily spot and address transactions that are most important to you.

## Introduction

*Transaction Flags* provide a straightforward and efficient way to keep transactions that require special attention on your radar. Flag transactions you want to stay on top of, such as recently updated transactions, transactions with received messages, or transactions in need of certain actions.

Use Pipeline's comprehensive search capabilities to create your own custom*Transaction Flags.* Pipeline will automatically flag matching transactions, making them highly visible and instantly identifiable to you.

	Transactions						
Add Transaction	Transactions 6 active transaction	s. <u>View all →</u>					
Import Transactions	addr, mls, agent, seller, buyer $\lor \ \mathbb{Q}$ Search	h ▼ Sort ▼ Columns ▼ Do	wnload 👻				
<ul> <li>My Shortcuts</li> </ul>	Transaction	Å. *	Status	Complete	Agents	Close Date 🌲	
🗘 Agent Tasks	🕕 芦 456 Jackson Ave.	L Condo	Listed		Robert Zimmer		
() For Review	🕕 芦 3 Romine Street, Phoenix, AZ 85001 (s	samp L Single Family Residential	Pending	14/18	Tammy Sheldo	Dec 08, 2023	
☆ Updated Today	378 Blurry Lane	L Single Family Residential	Pending	0/18	Tammy Sheldo	Dec 12, 2023	
	192 Barton Lane	L+B Industrial	Pending	6/10	Multi 🔗	Dec 27, 2023	
- Shortcuts	🕕 📮 5332 Rosewood Lane Apt 1, Dallas TX	76675 L+B Commercial	Pending	3/11	Multi 😤	Dec 07, 2023	
With Incomplete Checklists	183 Bark Street, Phoenix, AZ 85001	L Single Family Residential	Pendina	18/18	Tammy Sheldo	Dec 07, 2023	

## Save A Transaction Flag

**Save a Transaction Flag** for important transactions based on any search criteria. Pipeline will automatically flag matching transactions, making them highly visible and instantly identifiable to you.

Who Can Do This? Agents and admins can save their own Transaction Flags.

To save a search as a Transaction Flag:

1 Search for transactions that meet the criteria you want to flag.

Not sure where to start? Here are some examples  $\rightarrow$  of search criteria you can use to flag transactions.

## 2 Click [Save Search] once your search results appear.

Add Transaction	Transactions 3 matchi	ng transactions. <u>Vi</u>	iew all active transact							
Import Transactions	addr, mis, agent, seller, buyer \vee 🤇	Search 🔺	Sort 👻 Columns	<ul> <li>Download</li> </ul>	Save Sear	ch				
<ul> <li>My Shortcuts</li> </ul>	Status		Searching by Upc	ated On			• Your Shortcuts, or to ons matching this sear		ly add a	
🔂 For Broker Review	Any Status →	-	This Week		riagiconit	5 any transactio	ons matching this sea	cn.		*
() Key Dates	Label		Commissions			Checklist Stat	tus			
0 10,0000	Any Label →	-	Commissions -	•	-	Any Checkli	st → •	S	earch	
- Shortcuts	Transaction		÷	Status	Complete	Agents	Location	Sale Price	Close Date	÷
With Incomplete Checklists	789 Main Street		L Residential	Active	0/16	Martha Jewel	Paperless Real Estate	\$573,000		
Overdue Closing	3765 Elvis Presley Boulevard, M	demphis, TN, 38	1., L+B Residential	Listed	0/16	Multi 🔗	Broadway Office	\$689,000		
Closing in 30 days	123 Main Street		L Residential	Ready to Close	16/28	Martha Jawal	Paperless Real Estate	\$573,000		

3 Choose the red, green, or blue flag to represent your flagged transactions, thenname your flag.

addr, mls, agent, seller, buyer \vee 📿	Search 🔺 🗄	Sort 👻 Columns 🦷	<ul> <li>Download -</li> </ul>	Save Search	1			
Status		Searching by Upda	ted On		Side		Location	
Any Status $\rightarrow$	*	This Week		- X	Any Side $\rightarrow$	-	Any Location	→ <b>•</b>
Label		Commissions			Checklist Stat	us		
Any Label →	*	$Commissions \rightarrow$		•	Any Checkli	st → 💌		
	<u>2ut</u> ()		2	Save this searc		,		er
♫♡☆♀@©\$♡		hortcut			1		re Flag	e1
Name Your Search		hortcut		Choose a flag P P 2 Name Your Flag Updated This	1			X Close Date $\diamondsuit$
口 ♡ ☆ 央 企 ⑤ \$ ① Name Your Search Closing this month		hortcut		Choose a flag Name Your Flag Updated This Complete	a Week	Sav	Sale Price	
<ul> <li>Q ☆ ♀ @ ③ \$ ①</li> <li>Name Your Search Closing this month</li> <li>Transaction</li> </ul>	Save S	hortcut ¢ s	2 Contraction of the second se	Choose a flag Name Your Flag Updated This Complete	Week Agents	Sav	Sale Price	Close Date 🔶

4 Save your flag by clicking [Save Flag] Whenever a transaction meets the criteria you defined for a flag, that flag will be displayed next to it on your *Transactions List* page.

Save this search as a <u>Flag</u> ()	×
Choose a flag	
Name Your Flag	
Updated This Week	Save Flag

View Flagged Transactions

View flagged transactions to keep an eye out for transactions that are important to you when working in Pipeline. When a transaction matches one of your saved flags, it will be flagged automatically, making it easy to spot.

Who Can Do This? Agents and admins can view their own flags on transactions.

To view your flagged transactions:

**1** Go to the Transactions List page by clicking [Transactions] from the top menu.

2 View flagged transactions. Whenever a transaction meets the criteria you defined for a flag, that flag will be displayed next to it.

Search address, mis, agent, seller, l	buyer Q 🟠 <u>Transactions</u> Tasks Unassigned	Unreviewed Reports Refe	rence	+ 4	dd Transaction	PHelp 🛞 Rob	ert
Add Transaction	Transactions 6 active transactions.	view all $\rightarrow$					
mport Transactions	addr, mls, agent, seller, buyer $ arsigma  \mathbb{Q} $ Search $ \cdot $	▼ Sort ▼ Columns ▼ [	ownload 👻				
- My Shortcuts	Transaction		Status	Complete	Agents	Close Date 🌲	
🗘 Agent Tasks	🕕 芦 456 Jackson Ave.	L Conde	Listed		Robert Zimmer		Ę
() For Review	🍈 芦 3 Romine Street, Phoenix, AZ 85001 (sar	mp L Single Family Residentio	Pending	14/18	Tammy Sheldo	Dec 08, 2023	Ę
☆ Updated Today	378 Blurry Lane	L Single Family Residention	Pending	0/18	Tammy Sheldo	Dec 12, 2023	Ę
	192 Barton Lane	L+B Industric	Pending	6/10	Multi 😤	Dec 27, 2023	Ę
- Shortcuts	🕕 🍯 5332 Rosewood Lane Apt 1, Dallas TX 76	6675 L+B Commercia	Pending	3/11	Multi 🔗	Dec 07, 2023	1
With Incomplete Checklists	183 Bark Street, Phoenix, AZ 85001	L Single Family Residentic	Pendina	18/18	Tammy Sheldo	Dec 07, 2023	4

## View A Flag's Criteria

View the search criteria set for a flagand a list of transactions that currently match. You can view a flag's criteria either from flagged transactions on your *Transactions List* or when saving a search from the *Transaction Search* area.

Who Can Do This? Agents and admins can view the search criteria of their own flags.

View A Flag's Criteria via Flagged Transactions

To view the criteria set for a flag:

1 When viewing flagged transactions, click the flag next to a transaction.

1 378 B' m Lane	L Single Family Residential	Pending	0/18	Tammy Sheldo
🕦 🏳 192 Barton Lane	L+B Industrial	Pending	6/10	Multi 🔗

2 View the search criteria set for the flagin the *Search* area. A list of transactions currently meeting that criteria will be displayed below.

dd Tran Flag	Transactions 2r	natching transactions. <u>View all active transac</u>	tions →				
nport Tr Criteria	addr, mls, agent, seller, buyer	V Q Search - Sort - Column	- Download -	Save Search			
My Shortcuts	Status	Searching by Close Dat	e	Side			
Agent Tasks	Any Status →	<ul> <li>This Week</li> </ul>	-	X Any Side	$\rightarrow$		-
() Fo Flagged	Label Any Label →	Checklist Status	3	( -	Search		
☆ <sup>u</sup> Transactions	Transaction		\$ Status	Complete A	gents C	close Date 😄	
Shortcuts	📑 🕕 🔋 3 Romine Street, Phoe	enix, AZ 85001 (samp_ L Single Family Re	sidential Pending	14/18 T	ammy Sheldo D	ec 08, 2023	
With Incomplete Checklists Overdue Closing	🕕 芦 5332 Rosewood Lane	Apt 1, Dallas TX 76675 L+B Cor	nmercial Pending	3/11 N	1ulti 🚆 🛛 D	0ec 07, 2023	

View A Flag's Criteria via Transaction Search

To view the criteria set for a flag:

1 When saving a search as a flag click the flag you want to view the criteria for. The flags you're using will be crossed out.

Add Transaction	Transactions No	matchin	g transactions	s found. <u>Vie</u>	w all active tra	nsac	tions →			
Import Transactions	addr, mls, agent, seller, buyer	∨ Q	Search 🔺	Sort 🔻	Download	•	Save Search			
<ul> <li>My Shortcuts</li> </ul>	Status		Searching I	by Close Do	ite		Side		Location	
☆ Added On	All Active	× -	This Wee	k	•	×	Any Side $\rightarrow$	*	Any Location $\rightarrow$	*
Admin Tasks	Label		Commissio	ns			Checklist Status			
☆ Stewart Closings	Any Label $\rightarrow$	•	Commis	sions →		•	Incomplete	X -	Search	
Dupdated	Save this search / sort as a	Shortcu	<u>.t</u> 🚺		Save t	his s	earch as a <u>Flag</u>	0		×
- Shortcuts	Choose an icon	<b>\$</b> ①			Choos		flag			
With Incomplete Checklists	Name Your Search				Name	You	r Flag			
Overdue Closing	Closing this month		Save	Shortcut			's week		Save Fla	a



	Transactions					ch		
olete ar	Status Any Status → Label Any Label →	•	Searching by C This Week Checklist Status Any Checklis	6	K -	Side Any Side →	▼ Sea	Location Any Location - rch
ings I I I View all	Save this search / sort Choose an icon 오 ☆ 슈 슈 때 Name Your Search Closing this month	Flag in Use What would you lik Received Email		Remove Flag	ose a f	×	one	Save Flag

3 View the search criteria set for the flag in the Search area. A list of transactions currently meeting that criteria will be displayed below.

Search address, mls, agent, seller, buyer	C 🏠 Transactions Tasks U	nassigned	Unreviewe	d Reports Re	eference	+ A	dd Transaction	Help 🛞 Rob	oert Z
Add Tran Flag	Transactions 2 matching	g transactions	. <u>View all act</u>	ive transactions	<u>→</u>				
Import Tr Criteria	addr, mis, agent, seller, buyer \vee Q	Search 🔺	Sort 👻	Columns 👻	Download $\bullet$	Save Searc	h		
- My Shortcuts	Status		Searching b	y Close Date		Side			
	Any Status →	-	This Week		-	X Any S	de →		•
© r₀ Flagged ☆ <sup>u</sup> Transactions	Label Any Label →	-	Checklist Sto Incomplet		3	( - )	Search		
Tunsuctions	Transaction				\$ Status	Complete	Agents	Close Date 💠	
- Shortcuts	🍵 📁 3 Romine Street, Phoenix, AZ	85001 (sam	p L Singl	le Family Residen	tial Pending	14/18	Tammy Sheldo	Dec 08, 2023	٢
With Incomplete Checklists Overdue Closing	🍈 芦 5332 Rosewood Lane Apt 1, D	Dallas TX 766	875	L+B Commer	cial Pending	3/11	Multi 🚆	Dec 07, 2023	

# Remove A Flag

Remove a Transaction Flag when you no longer need it.

Who Can Do This? Agents and admins can remove their own flags.

To remove an existing *Transaction Flag*:



1 When saving a search as a flag view the flags you're currently using. The flags you're using will be crossed out.

Search address, mls, agent, se	ellier, b Q 🏠 Transaction	<u>s</u> Tasks Unas	signed Unreview	ed Reports F	eference		+ ? Help ۞ Hollis
Add Transaction	Transactions	No matching tre	ansactions found. <u>Vie</u>	w all active trans	actions $\rightarrow$		
Import Transactions	addr, mls, agent, seller, bu	iyer V Q Se	arch 🔺 Sort 🔻	Download 🗸	Save Search		
- My Shortcuts	Status	s	earching by Close Do	ite	Side		Location
☆ Added On	All Active	X -	This Week	- × X	Any Side →	*	Any Location $\rightarrow$ $\bullet$
Admin Tasks	Label	c	commissions		Checklist Status		
☆ Stewart Closings	Any Label $\rightarrow$	-	Commissions →	-	Incomplete	Х -	Search
☐ Updated	Save this search / sort	as a <u>Shortcut</u> (	)	Save this	s search as a <u>Flag</u>	6	3
- Shortcuts	Choose an icon	9 \$ 0		Choose o	a flag		
With Incomplete Checklists	Name Your Search			Name Yo	our Flag		
Overdue Closing	Closing this month		Save Shortcut	Closing t	his week		Save Flag
Closing in 20 days							

2 Click the crossed-out flag you want to stop using.

s flag is already in use. Click to nove or view search.		
Name Your Flag		
Closing this week	Save Flag	

**3** Confirm it's the flag you want to remove by clicking [View Search]. A list of transactions currently meeting the flag will be displayed, along with the search criteria set for it.



4 Click [Remove Flag] once you've confirmed you no longer need the flag.



## **Transaction Flag Examples**

*Transaction Flags* can be used in various ways to meet your specific role and workflow needs. Here are some examples of search criteria you can use to flag transactions:

### • Flag Transaction Changes

- transactions added today
- transactions updated today
- transactions whose status changed last week
- transactions whose status changed to closed this month

#### • Flag Important Dates

- transactions listed this month
- transactions accepted this week
- transactions closing tomorrow
- pending transactions closing this month with incomplete checklists

### • Flag People

- transactions of new agents (if an Agent Start Date is within the Last 365 Days)
- a specific agent's transactions (where a specific agent is added)
- transactions where a certain lender Company is involved(where a *Contact* with a specific *Company Name* is added)
- an admin's pending transactions (with a Transaction Name containing a specific emoji)

#### • More Flags

- transactions containing docs with missing signatures (with a Doc Label called, "Missing Sigs")
- pending transactions with commissions not entered
- transactions closing this week with commissions not entered

Feel free to experiment with different search criteria to find the flags that work best for you!