

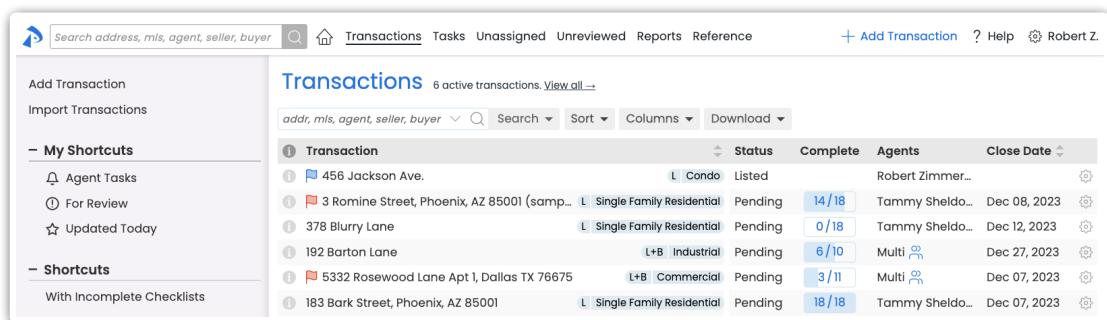
Transaction Flags

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.



The screenshot shows the Pipeline software interface. At the top, there is a search bar with the text "Search address, mls, agent, seller, buyer" and a search icon. To the right of the search bar are navigation tabs: "Transactions", "Tasks", "Unassigned", "Unreviewed", "Reports", and "Reference". Further right are links for "+ Add Transaction", "? Help", and a user profile icon for "Robert Z.". Below the search bar is a sidebar with "Add Transaction" and "Import Transactions" options, followed by "My Shortcuts" (Agent Tasks, For Review, Updated Today) and "Shortcuts" (With Incomplete Checklists). The main content area is titled "Transactions" and shows "6 active transactions. View all...". Below this is a search bar with "addr, mls, agent, seller, buyer" and a search icon, along with "Sort" and "Columns" dropdowns. The main table has the following columns: Transaction, Status, Complete, Agents, and Close Date. The table contains six rows of transaction data.

Transaction	Status	Complete	Agents	Close Date
456 Jackson Ave. Condo	Listed		Robert Zimmer...	
3 Romine Street, Phoenix, AZ 85001 (samp... Single Family Residential	Pending	14/18	Tammy Sheldo...	Dec 08, 2023
378 Blurry Lane Single Family Residential	Pending	0/18	Tammy Sheldo...	Dec 12, 2023
192 Barton Lane L+B Industrial	Pending	6/10	Multi	Dec 27, 2023
5332 Rosewood Lane Apt 1, Dallas TX 76675 L+B Commercial	Pending	3/11	Multi	Dec 07, 2023
183 Bark Street, Phoenix, AZ 85001 Single Family Residential	Pending	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.

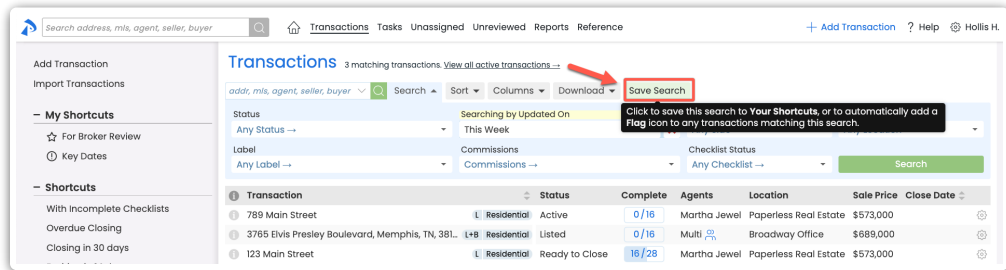
Who Can Do This? Agents and admins can save their own *Transaction Flags*.

To save a search as a *Transaction Flag*:

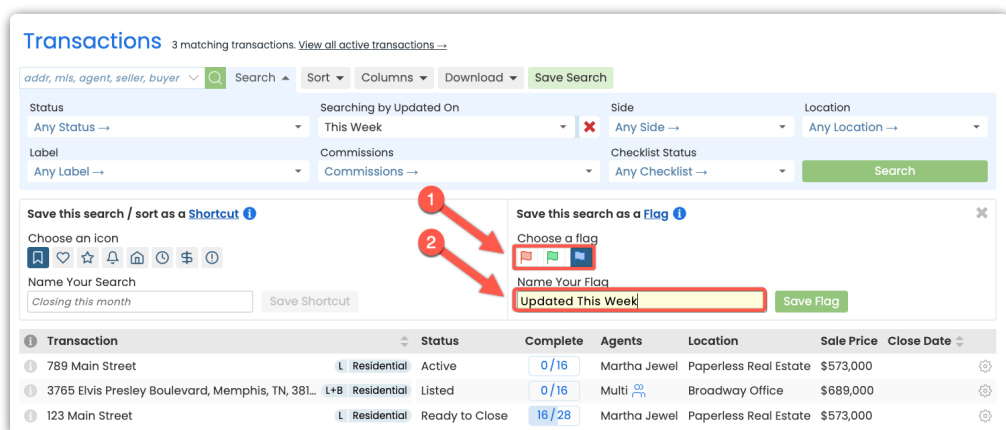
- 1 Search for transactions that meet the criteria you want to flag.

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

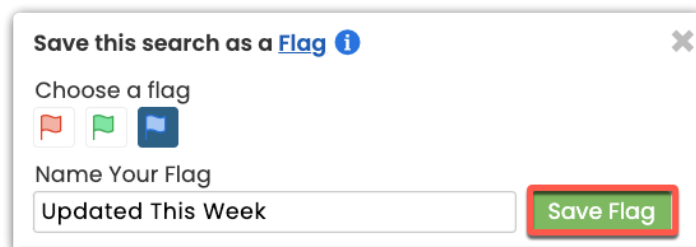
- 2 Click [Save Search] once your search results appear.



- 3 Choose the red, green, or blue flag to represent your flagged transactions, then name your flag.



- 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.



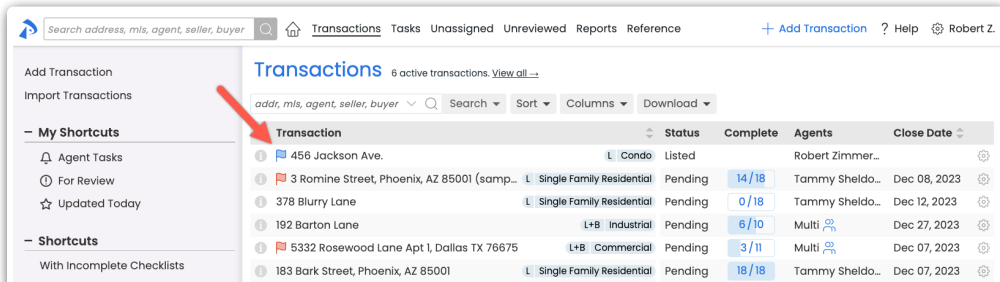
View Flagged Transactions

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.



The screenshot shows the 'Transactions' page in Pipeline. The page title is 'Transactions' with 6 active transactions. A search bar is at the top with filters for 'addr, mls, agent, seller, buyer'. A table lists transactions with columns for Transaction, Status, Complete, Agents, and Close Date. A red arrow points to a flag icon next to the first transaction row.

Transaction	Status	Complete	Agents	Close Date
456 Jackson Ave. Condo	Listed		Robert Zimmer...	
3 Romine Street, Phoenix, AZ 85001 (samp... Single Family Residential	Pending	14/18	Tammy Sheldo...	Dec 08, 2023
378 Blurry Lane Single Family Residential	Pending	0/18	Tammy Sheldo...	Dec 12, 2023
192 Barton Lane L+B Industrial	Pending	6/10	Multi	Dec 27, 2023
5332 Rosewood Lane Apt 1, Dallas TX 76675 L+B Commercial	Pending	3/11	Multi	Dec 07, 2023
183 Bark Street, Phoenix, AZ 85001 Single Family Residential	Pending	18/18	Tammy Sheldo...	Dec 07, 2023

View A Flag's Criteria

View the search criteria set for a flag and 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.

378 Barton Lane	L Single Family Residential	Pending	0/18	Tammy Sheldo...
192 Barton Lane	L+B Industrial	Pending	6/10	Multi

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

The screenshot shows the 'Transactions' search interface. On the left sidebar, 'Flag Criteria' and 'Flagged Transactions' are highlighted with red boxes. The main search area shows filters for Status (Any Status), Label (Any Label), and Checklist Status (Incomplete). Below the filters, a table displays search results with columns for Transaction, Status, Complete, Agents, and Close Date.

Transaction	Status	Complete	Agents	Close Date
3 Romine Street, Phoenix, AZ 85001 (samp...	L Single Family Residential	Pending	14/18	Tammy Sheldo... Dec 08, 2023
5332 Rosewood Lane Apt 1, Dallas TX 76675	L+B Commercial	Pending	3/11	Multi Dec 07, 2023

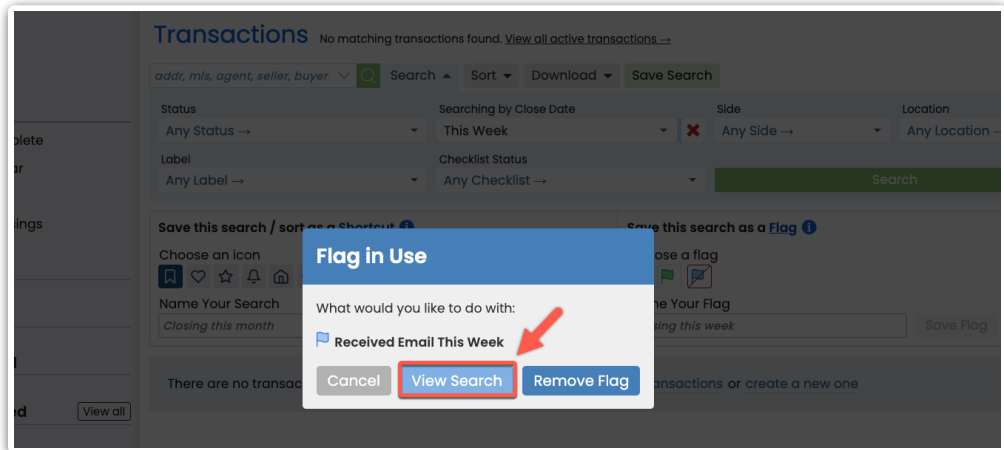
View A Flag's Criteria via Transaction Search

To view the criteria set for a flag:

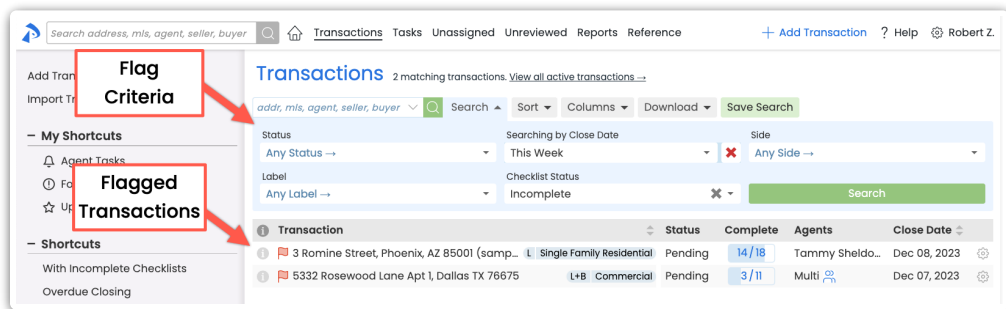
- When saving a search as a flag click the flag you want to view the criteria for. The flags you're using will be crossed out.

The screenshot shows the 'Save this search as a Flag' dialog box. It has two sections: 'Save this search / sort as a Shortcut' and 'Save this search as a Flag'. In the 'Save this search as a Flag' section, a red arrow points to the 'Choose a flag' area where a flag icon is selected. Below it, there is a 'Name Your Flag' field with the text 'Closing this week' and a 'Save Flag' button.

- Click [View Search].



- 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.



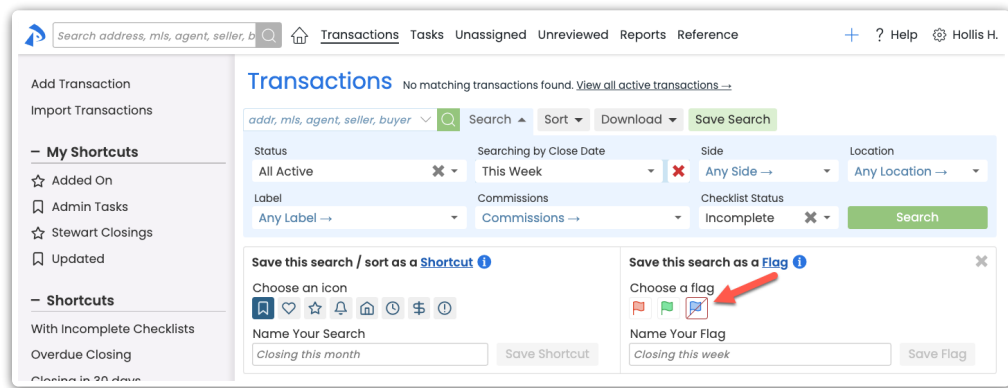
Remove A Flag

Remove a *Transaction Flag* when you no longer need it.

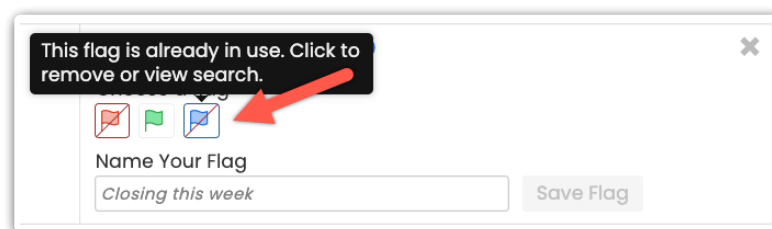
Who Can Do This? Agents and admins can remove their own flags.

To remove an existing *Transaction Flag*:

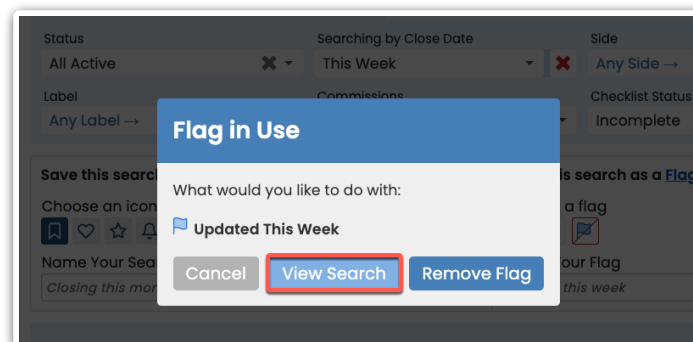
- 1 When saving a search as a flag view the flags you're currently using. The flags you're using will be crossed out.



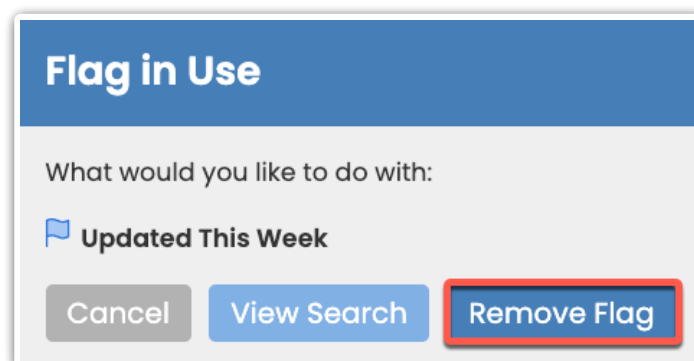
2 Click the crossed-out flag you want to stop using.



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!