

Save Custom Sort & Search Shortcuts

Save custom sorts and searches for quick access to transactions, tasks, and docs you need frequently.

Introduction

My Shortcuts is your personal list of shortcuts in the left menu of most pages throughout Paperless Pipeline. By saving a shortcut for your frequently used transactions, tasks, and document searches, you gain quick access to them later.

Save custom searches, sorts, or a combination of both to view essential information without reconfiguring your searches each time. Customize your shortcuts with unique names and icons for easy identification across Pipeline. Enjoy quick access to personalized lists that automatically update with new items matching your criteria, keeping you organized and focused.

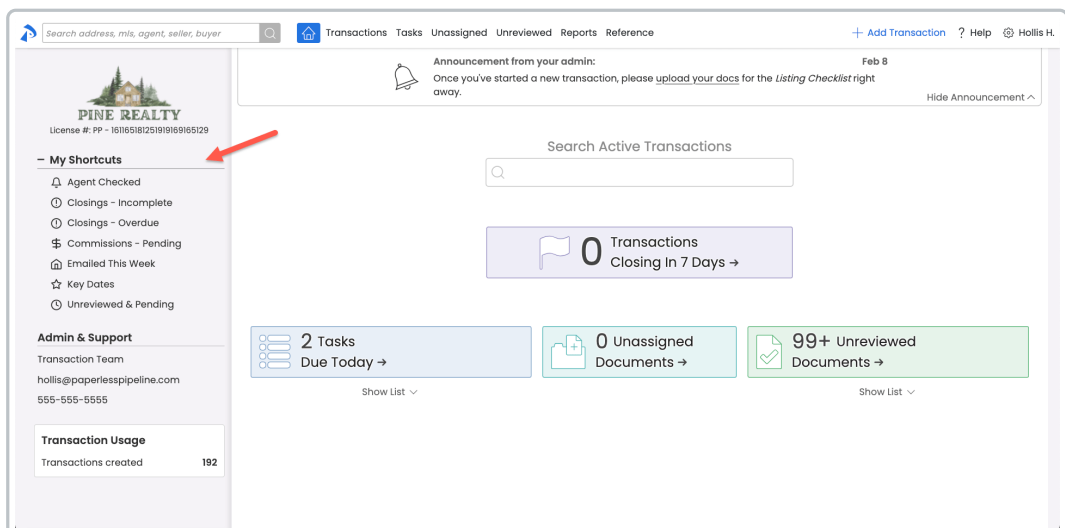
Access My Shortcuts

Access My Shortcuts for your personal saved shortcuts to transactions, tasks, and unreviewed documents.

Who Can Do This: Anyone can access their own saved shortcuts.

To access My Shortcuts:

- 1 Go to the [Home Page](#), [Transactions List Page](#), [Tasks Page](#), or [Unreviewed Docs Page](#).
- 2 View My Shortcuts in the left menu.
 - If you have set up shortcuts, click a saved shortcut to quickly run your custom sort and / or search.
 - The list will be blank if you haven't set any up shortcuts yet.



- 3 Add your own personal shortcuts as needed (outlined below).

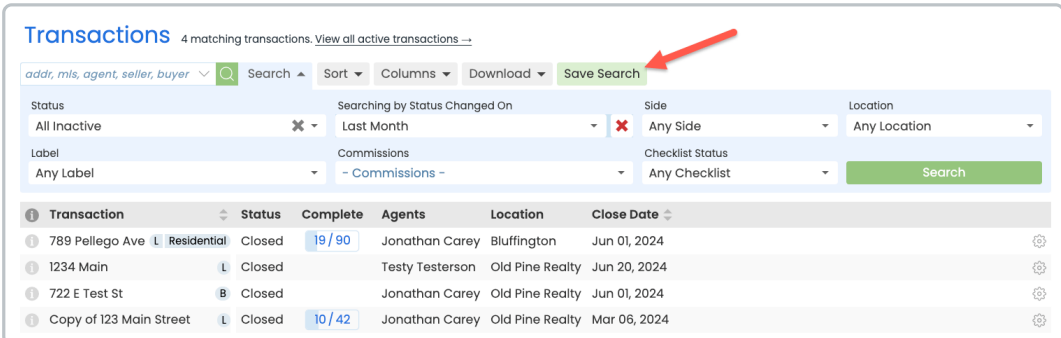
Save a Custom Transaction Shortcut

Save a custom transaction shortcut for quick access to frequently used transactions.

Who Can Do This: Anyone can save their own custom transaction shortcuts.

To save a custom transaction shortcut:

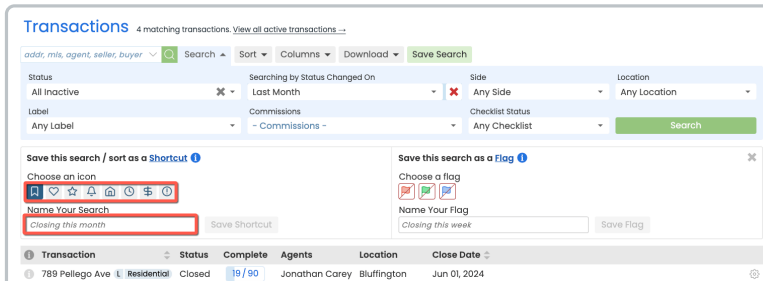
- 1 [Go to the Transactions List Page.](#)
- 2 [Search for the transactions you'd like to save for quick access.](#)
- 3 When your search results appear, click [Save Search] near the top of the page.



The screenshot shows the 'Transactions' page with 4 matching transactions. The search filters are: Status: All Inactive, Searching by Status Changed On: Last Month, Side: Any Side, Location: Any Location, Label: Any Label, Commissions: - Commissions -, Checklist Status: Any Checklist. A red arrow points to the 'Save Search' button in the top right corner of the search filters area.

Transaction	Status	Complete	Agents	Location	Close Date	
789 Pellego Ave	Residential	Closed	19 / 90	Jonathan Carey Bluffington	Jun 01, 2024	
1234 Main	L	Closed	Testy Testerson	Old Pine Realty	Jun 20, 2024	
722 E Test St	B	Closed	Jonathan Carey	Old Pine Realty	Jun 01, 2024	
Copy of 123 Main Street	L	Closed	10 / 42	Jonathan Carey	Old Pine Realty	Mar 06, 2024

- 4 Set up your shortcut in the left section, Save this search / sort as a Shortcut:
 - o Choose an icon to represent the transaction sort and / or search.
 - o Name the shortcut.



The screenshot shows the 'Save this search / sort as a Shortcut' dialog box. It has two sections: 'Save this search / sort as a Shortcut' and 'Save this search as a Flag'. The first section has a 'Choose an icon' dropdown with icons for search, sort, and combine, and a 'Name Your Search' field with the text 'Closing this month'. The second section has a 'Choose a flag' dropdown with flag icons and a 'Name Your Flag' field with the text 'Closing this week'. Both sections have 'Save' buttons.

- 5 Click [Save Shortcut]. Your custom shortcut will appear on the left menu in the My Shortcuts section.

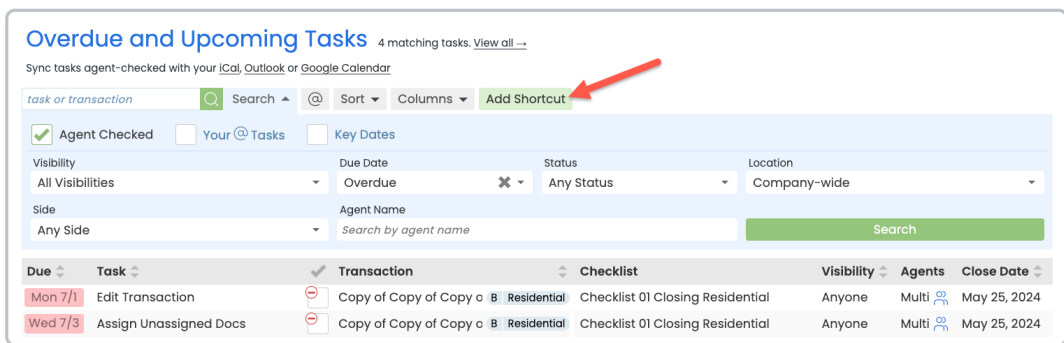
Save a Custom Task Shortcut

Save a custom task shortcut for quick access to frequently used tasks.

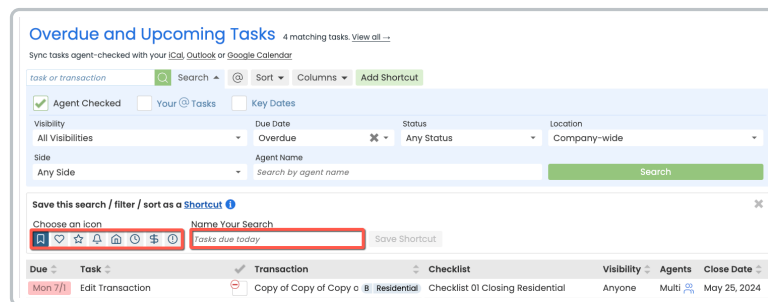
Who Can Do This: Anyone can save their own custom task shortcuts.

To save a custom task shortcut:

- 1 [Go to the Tasks List Page.](#)
- 2 [Search for the tasks you'd like to save for quick access.](#)
- 3 When your search results appear, click [Add Shortcut] near the top of the page.



- 4 Set up your shortcut:
 - Choose an icon to represent the task sort and / or search.
 - Name the shortcut.



- 5 Click [Save Search]. Your custom shortcut will appear on the left menu in the My Shortcuts section.

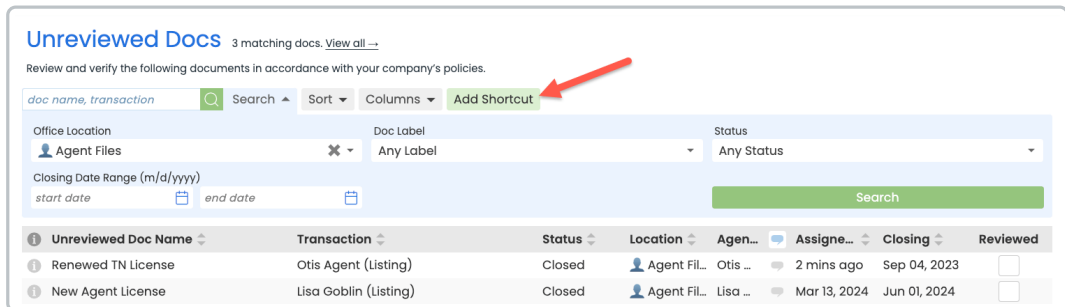
Save a Custom Unreviewed Docs Shortcut

Save a custom unreviewed docs shortcut for quick access to frequently used document searches.

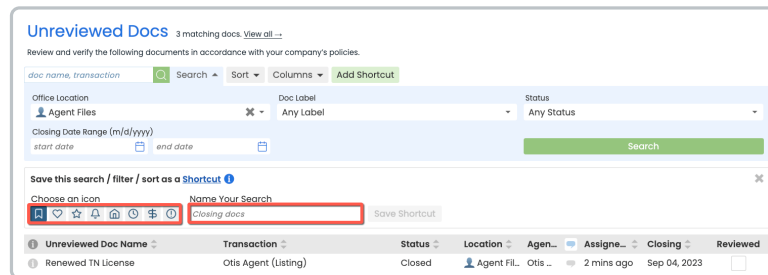
Who Can Do This: Anyone can save their own custom unreviewed doc shortcuts.

To save a custom unreviewed docs shortcut:

- 1 [Go to the Unreviewed Docs Page.](#)
- 2 [Search for the unreviewed docs you'd like to save for quick access.](#)
- 3 When your search results appear, click [Add Shortcut] near the top of the page.



- 4 Set up your shortcut:
 - Choose an icon to represent the unreviewed doc sort and / or search.
 - Name the shortcut.



- 5 Click [Save Search]. Your custom shortcut will appear on the left menu in the My Shortcuts section.

Delete a Saved Shortcut










Delete a saved shortcut to keep your list of shortcuts organized and up-to-date.

Who Can Do This: Anyone can delete their own saved shortcuts.

To delete an unwanted shortcut:

- 1 [Access My Shortcuts.](#)
- 2 Hover over your custom shortcut and click [X] when it appears to the right.

– My Shortcuts

-  Agent Checked
-  Closings - Incomplete  
-  Closings - Overdue
-  Commissions - Pending
-  Emailed This Week
-  Key Dates
-  Unreviewed & Pending

3 Click [Permanently Remove] to confirm deletion.