## **Custom Shortcuts**

### 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:



Go to the Home Page, Transactions List Page, Tasks Page, or Unreviewed Docs Page.

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.

Search address, mis, agent, seller, l	buyør	Q	Transactions	a Tasks	Unassigned	Unreview	ved Reports	Reference		+ Add Trans	action	? Help	Holl
A BALL					Announcer Once you'v away.	nent from e started a	your admin: new transact	ion, please <u>upload your d</u>	ocs for the <i>Lis</i>	Feb 8 <i>ting Checklist</i> right	Hide A	nnounce	ement ^
PINE REALTY     License #: PP - 1611651812519191691651     - My Shortcuts	129						Search /	Active Transaction	S				
Agent Checked													
① Closings - Incomplete													
① Closings - Overdue										-			
Commissions - Pending								Transactions					
Emailed This Week								Closing In 7 Days	<i>→</i>				
☆ Key Dates													
G oneviewed a rending													
Admin & Support			2 Tasks					) Unassigned		99+ Unreviewed			
Transaction Team			Due Today →					ocuments →		Documents →			
hollis@paperlesspipeline.com 555-555-5555			Show	/ List $\vee$						Show List $ \smallsetminus $			
Transaction Usage													
Transactions created	192												
	-												

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:

Go to the Transactions List Page.

Search for the transactions you'd like to save for quick access.

When your search results appear, click [Save Search] near the top of the page.

Transactions 4 matchin	g transactions.	View all ac	tive transactions -	<u>→</u>					
addr, mls, agent, seller, buyer \vee 🖸	Search 🔺	Sort 👻	Columns 👻	Download 👻	Save Searc	h			
Status		Search	ning by Status Cho	inged On		Side		Location	
All Inactive	×	Last	Month		- × X	Any Side	*	Any Location	
Label		Comm	nissions			Checklist Status			
Any Label		- Co	mmissions -		-	Any Checklist	-	Search	
Transaction 🗘	Status C	omplete	Agents	Location	Close	Date ≑			
789 Pellego Ave L Residential	Closed	19/90	Jonathan Car	ey Bluffington	Jun 01,	2024			
1234 Main	Closed		Testy Testerso	on Old Pine Rec	ilty Jun 20	, 2024			
1 722 E Test St B	Closed		Jonathan Car	ey Old Pine Rec	ilty Jun 01,	2024			
Copy of 123 Main Street	Closed	10/42	Jonathan Car	ey Old Pine Rec	ilty Mar 06	6, 2024			



4 Set up your shortcut in the left section, Save this search / sort as a Shortcut:

• Choose an icon to represent the transaction sort and / or search.

• Name the shortcut.

Transactions 4 matchin	g transactions. <u>Vie</u>	w all active transactions						
	Complete C	ant Calverage	Developed					
adar, mis, agent, seller, buyer 🗸 🧕	sedicin x si	on + Columns +	Download + s	ave searci	1			
Status		Searching by Status Ch	langed On		Side	Locatio	n	
All Inactive	ж-	Last Month		- X	Any Side	→ Any L	ocation	
Label		Commissions			Checklist Status			
Any Label		- Commissions -		*	Any Checklist			
Save this search / sort as a Short	aut 🕕		Save	this searc	:h as a <u>Flag </u>			
Choose an icon			Cho	ose a flag				
Д♡☆♀⋒©\$©			P					
Name Your Search			Nam	ne Your Flag	a			
Closing this month	Save Sh	ortcut	Clor	ing this wee	- >k	Save Flag		
-								
) Transaction $\Rightarrow$	Status Com	plete Agents	Location	Close D	ate \$			

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:



Go to the Tasks List Page.

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.

sync tasks agent-checked with your <u>iCal</u> , <u>Outlook</u> o	r <u>Goog</u>	le Calendar							
task or transaction Q Search •	@	Sort • Columns •	Add Sho	rtcut					
Agent Checked Your @ Tasks		Key Dates							
Visibility		Due Date		Status	S	Location			
All Visibilities	*	Overdue	Х-	Any	Status	Compan	y-wide		
Side		Agent Name							
Any Side	•	Search by agent name					Sec	ırch	
Due 💠 🛛 Task ≑	~	Transaction		÷	Checklist		Visibility 🌲	Agents	Close Date
Mon 7/1 Edit Transaction	Θ	Copy of Copy of Copy of	B Reside	ential	Checklist 01 Closing Resi	dential	Anyone	Multi 🔗	May 25, 20
Ned 7/3 Assign Ungssigned Docs	Θ	Copy of Copy of Copy	B Reside	ential	Checklist 01 Closing Resi	dential	Anvone	Multi 🔐	May 25, 20

#### 4 Set up your shortcut:

- Choose an icon to represent the task sort and / or search.
- Name the shortcut.

sk or transaction	Search 🔺 🥘	Sort - Columns	✓ Add Shortcut			
Agent Checked	our @ Tasks	Key Dates				
/isibility		Due Date	Status	Location		
All Visibilities	-	Overdue	🗶 👻 Any Status	<ul> <li>Compan</li> </ul>	y-wide	
Side		Agent Name				
Any Side	•	Search by agent nar	าาอ		Search	
ave this search / filter / sor	as a <u>Shortcut</u> ()					
Choose an icon	Name Your	Search				
	Tasks due to	odav	Save 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:



Go to the Unreviewed Docs Page.



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.

Unreviewed Docs 3 matchin Review and verify the following documents in acc	g docs. <u>View a</u> ordance with y	<u>II →</u> 'our company's	policies.					
doc name, transaction Q Search	Sort 👻	Columns 🔻	Add Shortcut					
Office Location		Doc Label			Status			
L Agent Files	Х-	Any Label		-	Any Status			-
Closing Date Range (m/d/yyyy)								
start date 🛗 end date	Ë					Sec	arch	
🕦 Unreviewed Doc Name 🌲	Transactio	n ‡	Status 🌲	Location 🌲	Agen 💻	Assigne 🌲	Closing 🌲	Reviewed
Renewed TN License	Otis Agent	(Listing)	Closed	👤 Agent Fil	Otis 🖤	2 mins ago	Sep 04, 2023	
New Agent License	Lisa Goblin	(Listing)	Closed	👤 Agent Fil	Lisa 💻	Mar 13, 2024	Jun 01, 2024	

#### Set up your shortcut:

- Choose an icon to represent the unreviewed doc sort and / or search.
- Name the shortcut.

Unreviewed Docs Review and verify the following docum	3 matching docs. <u>View</u> ients in accordance with	<u>all →</u> i your company's	policies.					
doc name, transaction	Search 🔺 Sort 🔻	Columns 👻	Add Shortcut					
Office Location		Doc Label			Status			
👤 Agent Files	х.	Any Label		*	Any Status			-
Closing Date Range (m/d/yyyy)								
start date 📋 end	date E	Э				Sei	arch	
Save this search / filter / sort as	a Shortcut 🕕							ж
Choose an icon	Name Your Sear	ch						
	Closing docs		Save Short	ut				
🚯 Unreviewed Doc Name 🗘	Transact	ion ‡	Statu	s 🗘 🔹 Location 🗘	Agen 🥏	Assigne 🗘	Closing 🗘	Reviewed
Renewed TN License	Otis Age	nt (Listing)	Close	d 👤 Agent Fil	Otis 📃	2 mins ago	Sep 04, 2023	

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:



Access My Shortcuts.

2 Hover over your custom shortcut and click [X] when it appears to the right.



3 Click [Permanently Remove] to confirm deletion.

# 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:



• Click [Tasks] from the top menu.

#### Search & Filter Tasks:

Search and / or filter for the specific tasks you want to sync to your calendar app.
 Learn more about Task Searching & Filtering →

#### 3 Add Shortcut:

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



#### 4 Set Up Shortcut

- Choose an icon to represent the task sort and / or search.
- Name the shortcut.

Overdue and Upcc Sync tasks agent-checked with your ICa	ming Tasks	4 matching tasks. <u>v</u> dar	/iew.all →				
task or transaction	Search 🔺 🔘 Sort	▼ Columns ▼	Add Shortd	ut			
Agent Checked Your	🖲 Tasks 📃 Key D	ates					
Visibility	Due D	ate	s	tatus	Location		
All Visibilities	- Ove	due	X	Any Status	* Compo	any-wide	+
Side	Agent	Name					
Any Side	▼ Sean	h by agent name				Search	
Save this search / filter / sort as a Choose an icon I ♡ ☆ 우 ⋒ ⓒ \$ ①	Shortcut () Name Your Search Tasks due today		Save St	ortcut			х
Due 🗘 🛛 Task 🗘	🗸 Tran	action		Checklist		Visibility 🗘 Agents	Close Date 🌐
Mon 7/1 Edit Transaction	😑 Copy	of Copy of Copy of	B Residen	ial Checklist 01 (	Closing Residential	Anyone Multi 🔗	May 25, 2024

#### 5 Save Shortcut

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

# **Custom Shortcuts**

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