Keyboard Shortcuts

Use a keyboard shortcut to quickly perform an action by pressing a specific combination of keys.

Who Can Do This: Anyone.

To use a keyboard shortcut in Paperless Pipeline:

Press Shortcut Keys: Press the correct keys for the shortcut (outlined below).

Release Keys: Release the shortcut keys.

See It Happen: The action is performed.

Quick Navigate

From anywhere in Pipeline, use the available hot keys to quickly navigate to a certain page from the top menu.

Go to Home Page

To go to the Home page, press the keys:

- Ctrl + Alt + 1 (Windows)

- Ctrl + Opt + 1 (MacOS)

Go to Transactions List Page

To go to the Transactions List page, press the keys:

- Ctrl + Alt + 2 (Windows)

- Ctrl + Opt + 2 (MacOS)

Go to Tasks Page

To go to the Tasks page, press the keys:

- Ctrl + Alt + 3 (Windows)

- Ctrl + Opt + 3 (MacOS)

Go to Unassigned Page

To go to the Unassigned page, press the keys:

- Ctrl + Alt + 4 (Windows)

- Ctrl + Opt + 4 (MacOS)

Go to Unreviewed Page

To go to the Unreviewed page, press the keys:

- Ctrl + Alt + 5 (Windows)

- Ctrl + Opt + 5 (MacOS)

Go to Reports Page

To go to the Reports page, press the keys:

- Ctrl + Alt + 6 (Windows)

- Ctrl + Opt + 6 (MacOS)

Go to Reference Page

To go to the Reference page, press the keys:

- Ctrl + Alt + 7 (Windows)

- Ctrl + Opt + 7 (MacOS)

Go to the Admin / Settings Area

To go to the Admin / Settings area, press the keys:

- Ctrl + Alt + Z (Windows)

- Ctrl + Opt + Z (MacOS)

Transactions

Use the available transaction hot keys to quickly add, edit and update a transaction.

Add Transaction

To add a new transaction (from anywhere in Pipeline), press the keys:

- Ctrl + Alt + T (Windows)

- Ctrl + Opt + T (MacOS)

Edit a Transaction

To edit the transaction you are viewing, press the keys:

- Ctrl + Alt + E (Windows)

- Ctrl + Opt + E (MacOS)

Navigate the Transaction Form

Once you're adding or editing a transaction, you can use the following keyboard shortcuts to quickly move through the fields and update information:

- **Move Through Fields**: Use the Tab key to swiftly move through each field. This is the fastest way to make updates without needing to use your mouse.

- **Navigate Dropdown Menus**: Use the arrow keys to move through the options. Press Enter to select the desired option.

- **Type Dates**: Type the date directly into the field. You can then press Tab to move on to the next field.

Documents

Use the available hot keys for docs to quickly upload docs, navigate docs and (for admins) mark them as Reviewed.

Upload Docs

To upload Unassigned docs (from anywhere in Pipeline), press the keys:

- Ctrl + Alt + D (Windows)

- Ctrl + Opt + D (MacOS)

Navigate Docs

While you're previewing documents in Pipeline, use the available hot keys to quickly navigate through docs.

- **Show Next Page**: Press ˃

- **Show Previous Page**: Press ˂

- **Jump to a Specific Page**: Type in the page number.

- **Show Previous Doc**: Press **Shift +** ˃

- **Show Next Doc**: Press **Shift +** ˂

Mark a Doc as Reviewed

(For admins) To mark a doc as Reviewed, press the keys:

- Alt + R (Windows)

- Opt + R (MacOS)

Messaging

Compose a Note / Email

To compose a note or email on a transaction or the Reference page, press the keys:

- Ctrl + Alt + N (Windows)

- Ctrl + Opt + N (MacOS)

Pipeline Pro: Keyboard Shortcuts ⊠

In this Pipeline Pro webinar, learn valuable keyboard shortcuts that will streamline and optimize your Pipeline skills.

🕐 **19:28**