

Power through your daily Pipeline workflow with the keyboard

Once the modifier's in muscle memory, the day's most common Pipeline actions stop needing the mouse at all. Add a transaction. Jump to the page you need. Compose a note. Mark a doc reviewed. This use case walks the daily flow and the shortcuts that drive each step.

Introduction

A typical admin or TC day in Pipeline cycles through a small set of actions over and over: review the dashboard, add new transactions as they come in, page through unreviewed docs, send notes and emails, check tasks. Each one has a shortcut, and stringing them together compounds — the time savings on any single action is small, but you do them dozens of times a day.

This isn't all-or-nothing. Use the shortcuts you remember; reach for the mouse on the ones you don't. The two with the biggest payoff are *Add Transaction* and the page-jump shortcuts, because they cover the moves you make the most.

Why this saves a real amount of time

The math is simple: every shortcut shaves a couple of seconds (move the mouse, find the link, click). A heavy day might mean 50–100 of those moves. Two seconds saved 75 times is two-and-a-half minutes you didn't spend hunting menus. Every day, every week. The keyboard layer doesn't change *what* Pipeline does; it just removes the friction.

1. Start at Home and pin shortcuts to muscle memory

Open Pipeline and try the two shortcuts you'll use most: **Ctrl + Alt + 1** (Mac: **Ctrl + Opt + 1**) for *Home*, **Ctrl + Alt + 2** for *Transactions List*. The number keys mirror the top menu's order. That's the whole pattern for navigation.

2. Add transactions without the mouse

When a new deal comes in, hit **Ctrl + Alt + T** from anywhere in Pipeline. The *Add Transaction* form opens immediately.

Learn how → [Transactions](#)

3. Jump straight into the doc uploader

Need to upload paperwork as it lands? **Ctrl + Alt + D** opens the uploader without going to a transaction or a list first. Useful when you've got a stack of unrelated docs to scan into *Unassigned*.

Learn how → [Document Upload](#)

4. Page through unreviewed docs

Open *Unreviewed* (**Ctrl + Alt + 5**) and start reviewing. Inside the preview, **→** and **←** flip pages; **Shift + ↓**

moves to the next doc. For admins, **Alt + R** (Mac: **Opt + R**) marks the current doc as reviewed.

Learn how → [Doc Review](#)

5. Edit the transaction you're looking at

Pulled up a transaction and need to change a field? **Ctrl + Alt + E** opens the edit form for the transaction you're viewing.

6. Compose notes and emails inline

While you're on a transaction, **Ctrl + Alt + N** opens the compose pane. Type, send, and the note logs to the transaction without leaving the keyboard.

Learn how → [Transaction Notes](#)