Catch Status Changes Without Watching the Transactions List

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A deal moves to Fell Through and nobody tells you. Pipeline has no real-time alert for that — but four things between them cover the job, and which you pick comes down to how fast you need to know.

Introduction

The worry behind this is always the same. An agent quietly moves a transaction to Closed, or to Fell Through, and the admin finds out three days later, after the compliance window for collecting the termination paperwork has already opened and half closed. Nobody did anything wrong. There was just no moment where the change reached anyone.

Pipeline doesn't send an alert the instant a status changes, and it doesn't let you CC anyone on the reminders it does send. Both come up often enough to be worth saying plainly rather than leaving you hunting for a setting.

What does exist is four different ways to close the gap, and they sit at different speeds. A morning email that tells you everything that moved yesterday. A saved search you click when you want to look. An outside alert wired up through Zapier for the one status that really can't wait. And an admin-only checklist task standing in as the reminder the system won't send. Most offices end up using two of them.

When to Use This

- An agent moved a deal to Fell Through and you didn't find out for days.
- Your compliance process needs fall-through paperwork collected quickly, and it starts with knowing.
- You want to see what got created and what moved yesterday without opening the Transactions page.
- You went looking for a way to CC the office admin on the closing reminder and there's no CC field.
- You're deciding whether agents should be able to close or cancel a deal themselves at all.

Why This Is a Morning Digest, Not an Alert

It's fair to expect an instant notification — most software you use sends one, and the request has been on the record here since 2013. The honest answer is that Pipeline doesn't, and building your process around a notification that isn't coming is how deals get missed for a second time.

So the useful reframe is to stop asking to be interrupted and start asking how fresh the information has to be. Almost everything an admin does with a status change — pull the termination form, start the payout, reassign the file — is next-morning work anyway. A digest that lands before you open your laptop is genuinely enough, and it's the one option that requires nothing of anybody after you switch it on. Reserve the faster tools for the one or two statuses where a day actually costs you something.

1. Turn On the Morning Digest

Start here, because it covers the widest ground for the least work. One email each morning listing every transaction created the day before and every one that changed status, with the status each moved to — so a deal that went Fell Through on Tuesday is in front of you Wednesday, named, without anyone having to tell you.

Every morning, a single email tells you what happened in your account the day before — the transactions added, the ones that changed status, and how many docs are still sitting unassigned.

See Daily Activity Emails

> Two things to know before you rely on it. It's a personal setting on each admin's own profile — you can't switch it on for someone else, so anyone who needs it turns it on themselves. And only two things count as activity: a transaction being created, and a transaction changing status. Editing a field on an existing deal doesn't put it in the email.

2. Save the Search That Finds What Moved

When you want to look rather than wait, search on the status you care about plus **Status Changed On** — every deal that went Fell Through in the last week, say — and save it. It sits in your left menu and re-runs fresh every time you click it, so "what fell through recently" becomes one click instead of a search you rebuild each time.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

3. Fire an Outside Alert on the One Status That Can't Wait

For the status where a day genuinely costs you — a fall-through with a compliance clock, a closing that triggers a payout — you can push the notification outside Pipeline. A transaction changing status is something Zapier can watch, and from there it can send a mail, post to a channel, or start a task in whatever your office actually monitors.

Connect Pipeline to QuickBooks, your CRM, or a spreadsheet, and let a transaction changing status kick off whatever comes next.

See Zapier Integration

4. Put the Reminder on a Checklist Instead

The other half of this problem isn't finding out — it's making sure something happens next. Add the follow-up as a task on the checklist that lands at that stage and set it to be visible to admins only: the agents never see it, and it arrives in the admin's own daily task reminder as a dated, named piece of work. That's the reminder the system won't send, built out of parts you already have.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

5. Decide Who's Allowed to Move a Deal at All

Worth considering alongside the rest: you can stop the surprise at the source. Agents' ability to set the closed, terminated, and expired statuses is itself a setting — switch it off and those moves come to an admin as a request rather than as something to be discovered afterward. It's the one option here that changes the workflow rather than reporting on it, and for offices where the status change *is* the compliance event, it's usually the right one.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses