Tasks Search

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Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.

Introduction

The Tasks page holds everything due across every transaction you can reach, which on a busy account is more than anyone reads top to bottom. Search, filters, and sort are how you cut it down to the set you actually came for.

The three work in layers. Search matches on a name, either the task's or the transaction's, and filters carve by the details around it: who's mentioned, which agent, what's due when, what state it's in. Sort arranges whatever survives. Stacking them is the point, because one filter rarely answers a real question and three usually do.

Which files are still missing a listing agreement? That's a few clicks away, and so is one coordinator's whole week. A search you run often can be kept instead of rebuilt each time. One limit is worth knowing up front, because it explains most empty results. The Tasks page is built around due dates, so a task without one never turns up here to be found.

How It Works

Search, filter, and sort are three separate controls that work on the same list. Start broad, then layer them until only the tasks you care about remain.

Search by Name

Searching looks inside two fields — the *Task Name* and the *Transaction Name* — so you can find a task either by what it is or by which deal it's on.

Filter to Drill Down

Filters slice the list by a task's details. Combine as many as you like — for example, one agent's tasks that are also key dates due this month — and Pipeline shows only the tasks that match every filter you set.

Sort the Results

The list is sorted by due date out of the box, earliest first. Sort lets you reorder it by another field when a different view is more useful.

Saving a Search You Run Often

Once you've built a search or filter you'll want again, you can save it as a shortcut using Pipeline's account-wide search tools, so it's one click away next time.

Search for a Task

> Find a specific task by its name or by the transaction it belongs to.

> **Who Can Do This**: Anyone who can view the Tasks page.

To search for a task:

1. Click [Tasks] from the top menu.
2. Click [Search].
3. Type your search term. Pipeline looks for it in both the *Task Name* and *Transaction Name* fields.
4. Click [Search Tasks].

The list narrows to the tasks that match your term.

Filter Your Tasks

> Carve the list down by a task's details, combining filters to reach an exact set.

> **Who Can Do This**: Anyone who can view the Tasks page.

To filter your tasks:

1. Click [Tasks] from the top menu.
2. Click [Filter].
3. Choose one or more filter options — *Your @ Tasks* (tasks you've been @mentioned on), *Agent Checked*, *Key Dates*, *Task Visibility*, *Task Due Date*, *Status*, *Side*, and *Agent Name*.
4. Click [Filter Tasks].

The list shows only the overdue and upcoming tasks that match every filter you selected. To clear them, run the filter again with nothing selected.

Sort Your Tasks

> Reorder the list by a field other than due date.

> **Who Can Do This**: Anyone who can view the Tasks page.

To sort your tasks:

1. Click [Tasks] from the top menu.
2. Click [Sort].
3. Select the field you want to sort by.

The list rearranges by the field you picked. Leave it be to keep the default due-date order, earliest first.

Search Across Your Whole Account

The tools above search within your tasks. To search across everything in your account — transactions, contacts, and more — and to save any search you run often as a shortcut, use Pipeline's account-wide search tools.

Keep a Search You'll Run Again

The filters on this page reach tasks and nothing else. Saving a view is handled account-wide, though, so one shortcut list ends up holding your transaction and contact searches alongside your task ones.

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

Tasks Search FAQ

Search finds a task by name, filters carve the list by its details, and sort arranges what's left. Answers to the common questions about finding one task, seeing only your @mentions, why "Due Today" leaves out overdue work, and filtering to one agent. See Tasks Search FAQ.

Ways to Use Tasks Search

See Tasks Search at work inside a bigger job:

- Find One Person's Tasks Across the Whole Account