User Search

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Narrow the Manage Users page to the person or group you need — search by name, by email, or by role.

Introduction

A roster of a dozen people is easy to scan. A roster of three hundred isn't, and the person you need is never near the top of it.

The Quick Search box narrows your roster down to what you asked for. Give it a name or an email address when you're after one person, or a role when you're after a group, which is the difference between fixing one agent's access and reviewing every admin on the account in one sitting. It works on your own roster rather than searching all of Pipeline, so what comes back is always your people.

That's what keeps a large roster usable: you stay a click away from whatever you came to change, however many people are on the account. And when somebody doesn't turn up, it's usually the view rather than the search. Your list opens on active users only, and it pages once the roster outgrows a screen, so widen what you're looking at before you decide the person isn't there.

How It Works

Searching your roster is two moves: type what you know about a person, or type a role to pull up everyone who holds it.

The Quick Search Box

It sits at the top of the Manage Users page. Enter a user's name or email address and Pipeline shows you the people who match. See Users List.

Searching by Role

Type `role:` followed by a role — `role: admin`, for example — to list everyone who holds it. It's how you work with a group together instead of hunting them down one at a time.

Getting Your Full List Back

A search replaces the roster with its results. Click [View active users] to return to the full list of active users.

Opening What You Found

Results behave like the rest of the roster: click a person's name, or the [Gear] beside it, to open their record. See User Profile.

Search for a User

Find one person on your roster by name or email address.

Who Can Do This: Admins who can reach the Manage Users page.

To search for a user:

1. Click [Manage Users] from your admin settings.
2. In the Quick Search box at the top of the page, enter the user's name or email address.
3. Click [Search Users], or press [Enter].

The users who match appear in the list. Click a name, or the [Gear] beside it, to open that person's record.

Search Users by Role

Use the Quick Search box to list everyone with a given role.

Who Can Do This: Admins who can reach the Manage Users page.

To search users by role:

1. On the Manage Users page, type `role:` followed by the role you want — for example, `role: admin`.
2. Click [Search Users] or press [Enter].
3. To return to your full list, click [View active users].

The page shows everyone who matches that role, so you can review or act on the group together.

Frequently Asked Questions

How do I find one person on my roster?

Search their name or email address in the Quick Search box. It's at the top of the Manage Users page. Enter what you know and click [Search Users], or press [Enter]. See User Search.

Can I list everyone with a certain role?

Yes — search `role:` followed by the role. Searching `role: admin`, for example, lists all your admins so you can review the group together. Use the role as it appears on your users' profiles. See User Profile.

How do I get my full roster back after a search?

Click [View active users]. A search replaces the list with its results; that link returns you to the full list of active users. See Users List.

Can I edit someone straight from my search results?

Yes. Results behave like the rest of the roster — click a person's name, or the [Gear] beside it, to open their record and make a change. See User Profile.

Can I search for users from anywhere in Pipeline, the way I search

transactions?

This search works on the Manage Users page. It narrows the roster in front of you. The account-wide search tools are a separate set of features with their own articles, and those are on the way.