Build the Saved Views Your Office Works From Every Morning

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The same three searches, every morning. Run each one once, save it, and the day starts with a click instead of a rebuild.

Introduction

The Transactions page can answer almost any question about your deals, but only after you've asked it: pick a status, set a date range, choose a location, sort the result. Do that at nine every morning and you're rebuilding the same question five days a week.

A shortcut holds the question. Ask it once, save it under a name, and it sits in your left menu waiting. Click it and Pipeline runs the whole thing again from scratch, so a shortcut built around a relative date range keeps working as the dates roll forward. *Closing in the next 30 days* means a different set of deals every week, and you never touch it.

What follows is the set most offices end up with, and the searches behind each one.

When to Use This

- You rebuild the same search on the Transactions page every morning before you can start work.
- The built-in *Overdue Closings* and *30-Day Closings* shortcuts disappeared and you want them back.
- You want a per-agent or per-office view without scrolling the whole company's list.
- Your marketing coordinator asks an admin for the week's pendings and solds every Monday.
- You sort the list by close date and it resets the moment you come back to the page.

Why This Beats Waiting for a Report

The instinct is to ask for the report to come to you: a daily email with this week's closings, a Monday morning list of everything that went pending. Pipeline doesn't send those. There's no scheduler that emails a filtered transaction list on a timetable you set, and asking for one is the long way around a thing you can already have.

A shortcut inverts it. Instead of a report that was true when it was generated, you get the question itself, kept, and answered fresh the moment you click. It arrives on your cadence rather than a schedule somebody else set, and it's never a day stale.

1. Run the Search Before You Save It

Shortcuts are built out of results, not out of a settings page, so the work starts on the Transactions page with the search itself. *More Search Options* is where status, close-date range, side, and location live, and Global Search is where you scope to one agent or one contact. Layer them until the list on screen is the list you want handed back to you tomorrow.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See [Transaction Search]

> Sort before you save, not after. The sort is part of what a shortcut keeps, which is the fix for a list that insists on reordering itself every time you come back to it.

2. Save the Result as a Shortcut

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. Rebuild the Retired Built-In Views

Pipeline used to ship *Overdue Closings* and *Closing in 30 Days* to everybody. Those went away in favor of shortcuts you build yourself, and both are a single search to get back. Neither could be edited when they were built in, which is the other half of why they were retired: yours can be exactly the window you want rather than the one that shipped.

To rebuild overdue closings:

1. Open the Transactions page and expand *More Search Options*.
2. Set **Status** to **All Active**, which covers Active, Listing, Pending, and Other.
3. Set the **Close Date** range to the last 365 days.
4. Run the search, then save it as a shortcut named for what it answers, such as*Overdue*.

What comes back is every deal still sitting in an active status whose close date has already passed. For the upcoming side, run the same search with a **Close Date** in the next 30 days and save that as its own shortcut. Both are relative ranges, so they roll forward on their own and neither needs touching again.

4. Build the Ones Your Office Actually Runs On

Past the two rebuilt views, the useful shortcuts are the ones shaped like your office rather than like the product.

- **One agent's transactions** — Global Search on **agent:** with their name or email address, saved under their name. Master admins who see everything by default get the most out of this one.
- **This week's pendings and solds for one office** — *More Search Options* filtered to the status and the location, saved as two shortcuts rather than one. It's the standing answer to a marketing coordinator who needs the same list every Monday.

- **What changed today** — a search on **Updated On** with a range of today, saved and clicked each afternoon. It's the closest thing to a feed of what your agents have been editing.
- **The statuses you'd otherwise leave parked** — deals waiting on final docs belong in their real Closed or Fell Through category, not held in Active so they stay visible. A shortcut per status gives you the visibility without the misfiling.

> There's no single filter for *active only, in this location*, because active is four status categories rather than one setting. Build a shortcut per category you care about and combine each with the location, or accept the wider view.

> Eight slots, per person, and a saved shortcut can't be edited afterward. Spend them on the questions you ask weekly rather than the ones you asked once, and change one by deleting it and saving a new search in its place. See Custom Shortcuts.

5. Take a Saved View Out as a Spreadsheet

A shortcut is a screen. When somebody wants the same list in a file, click the shortcut to run it and download the results from there, which means every view you've saved doubles as a repeatable export without you rebuilding the search to get it.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads