

Custom Shortcuts FAQ

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A shortcut saves the search, filter, and sort you just ran under a name and icon in your left menu, personal to you and re-run fresh on every click. Answers to the common questions about how many you can keep, changing one, who else can see them, and where the built-in shortcuts went.

How many shortcuts can I save?

Up to eight. The ceiling keeps the menu short enough to scan, so when you're full, delete one you've stopped using and save the new one in its place.

Can I rename or change a shortcut?

Not directly — delete it and save a new one. A saved shortcut holds whatever name, icon, and search criteria it was built with, and none of them can be edited afterward. Rebuilding takes about as long as it took the first time.

Can anyone else see my shortcuts?

No — your shortcuts are yours alone. Every Pipeline user saves their own, so nothing you save shows up in a teammate's menu, and nothing you save changes what anyone else sees on their own pages.

Does a shortcut show the same results every time I click it?

No — it re-runs the search fresh. A shortcut stores the question, not the answer, so an *Overdue* shortcut keeps telling you what's overdue today rather than what was overdue the day you made it.

Where did the built-in shortcuts like *Overdue Closings* go?

They were retired in February 2024 — rebuild the ones you want as your own. The change was account-wide and deliberate: most offices used only a couple of the built-ins, so the menu is now whatever each person puts in it. For *Overdue Closings*, search transactions in [All Active] statuses with a Close Date in the [Last 365 Days] and save that. For *With Incomplete Checklists*, search by an incomplete Checklist Status and save that.

Can I save a shortcut for tasks and unreviewed docs too?

Yes — the same [Add Shortcut] works on all three pages. Run your search, filter, or sort on the Tasks or Unreviewed page exactly as you would on Transactions, then save it. Everything you save lands in the same *Custom Shortcuts* menu.

Learn More

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](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
