Custom Shortcuts

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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.

Introduction

Every morning it's the same list. This month's closings, one agent's pendings, the docs still waiting on review. You run the search, set the filters, sort it the way you like it, and tomorrow you do all of that again.

Custom Shortcuts is where that stops. Run the search once, save it, and it sits in the left menu under a name and an icon you picked, one click away from wherever you are. What's saved is the search itself rather than the results it returned, so the list is current every time you open it as deals move in and out of it. The same save works across transactions, tasks and the docs awaiting review, so every list you live in can be kept the same way.

Your shortcuts are your own. Everyone builds the set that fits their day, so yours can be shaped entirely around what you work on without changing anyone else's menu, and the morning starts on the list instead of on rebuilding it.

How It Works

A shortcut saves a *question*, not a list. It's something you've already worded, waiting to be asked again.

What a Shortcut Saves

The whole combination — whatever you typed into the search, every filter you selected, and the sort you chose — kept as one named view under an icon you pick. The same save works from your *Transactions*, *Tasks*, and *Unreviewed* pages, so whatever a page can search, filter, and sort, a shortcut can keep.

What Happens When You Click One

Pipeline runs the search again, right then. You get today's answer rather than a snapshot of the day you saved it, which is what keeps a shortcut like *Overdue* worth having as deals move in and out of it.

How Many You Can Keep

Eight per user. That's a deliberate ceiling — the menu stays short enough to scan — so when you're full, delete one you've stopped using to make room. Nobody else sees yours, and saving one changes nothing about the records themselves.

Build the search itself on the page it belongs to.

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

Save a Shortcut

Keep a search, filter, and sort you run often as a named shortcut in your left menu.

Who Can Do This: Any Pipeline user, for their own shortcuts.

To save a shortcut:

1. Click [Transactions], [Tasks], or [Unreviewed] from the top menu, depending on what you want to save.
2. Run the search, filter, and/or sort you want to keep.
3. When your results appear, click [Add Shortcut] near the top of the page.
4. Choose an icon to represent your shortcut, then name it.
5. Click [Save Search].

Your shortcut now sits under *Custom Shortcuts* on the left menu. Name it for the question it answers — *Overdue*, a person's name, a location — and it'll still make sense to you in six months.

Use a Saved Shortcut

Re-run a saved search in one click from the left menu.

Who Can Do This: Any Pipeline user, for their own shortcuts.

To use a saved shortcut:

1. Open your Home, Transactions, Tasks, or Unreviewed page — *Custom Shortcuts* sits on the left menu of each.
2. Click your shortcut under [Custom Shortcuts].

Pipeline runs the saved search, filter, and sort and hands you the result as it stands right now.

Delete a Shortcut

Remove a shortcut you no longer use. A saved shortcut can't be renamed or edited, so this is also how you change one — delete it, then save a new one.

Who Can Do This: Any Pipeline user, for their own shortcuts.

To delete a shortcut:

1. Hover over the shortcut under [Custom Shortcuts].
2. Click the red [X] that appears to the right of it.
3. Click [Permanently Remove] to confirm.

The shortcut disappears from your menu. Your transactions, tasks, and docs are untouched — a shortcut only ever held the search.

Frequently Asked Questions

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.