

List Sorting

Last Modified on 09/04/2026 11:14 am EDT

Sort any list on the column that matters to the job in front of you. Which lists hold that order for next time, and which start fresh, is worth knowing before you set one.

Introduction

You sorted the Transactions page by close date on Monday and this morning it's back the way it was. Or the other way round: a transaction's documents are running Z to A and nobody remembers asking for that.

Sorting is a view rather than a setting. Click a column and Pipeline re-orders what's in front of you, and nothing about the transactions, the docs or anyone else's screen changes. Each list then makes its own decision about how long your choice lasts. Some carry it to the next page you open, some let it go the moment you leave.

So a sort that didn't survive the night is usually the page telling you which kind it is. On the pages that start fresh, saving the sorted list as a Custom Shortcut is what brings that order back in one click.

How It Works

Sorting re-orders the list you're looking at. What changes from page to page is how long the order lasts.

One Sort Rule at a Time

Pipeline sorts a list on one column, so every row has a defined place. Two orders at once — by list date, with agents grouped alphabetically inside that — is more than one list can resolve. Sorting also reads the list's own columns and nothing else, so there's no way to pin one deal, or one status, to the top.

What's Still There When You Come Back

Each list answers this for itself, and the answer is the difference between setting a sort once and setting it every morning.

The list	What your sort does when you come back
A transaction's documents	Follows you. The order you set carries to every transaction you open after that, until you change it
The <i>Transactions</i> page	Starts fresh. Save the sorted list as a Custom Shortcut to get it back in one click
The <i>Unreviewed</i> page	Holds while you work, then opens on the default order next time
The <i>Unassigned</i> page	Holds for the visit, then opens on the default order next time
The <i>Tasks</i> page	Opens by due date, earliest first, so overdue work leads

Your Sort Is Yours

A sort belongs to your login in the browser you're using. Put the labelled docs on top and your teammates' lists stay exactly as they had them, which is what lets everyone order the same page around their own job.

Get the Same Order Back Tomorrow

Once you know a page starts fresh, the question stops being how to make the sort stick and becomes how to get back to it quickly.

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](#)

Set the Order Documents Appear In

The documents inside a transaction are the one list that carries your choice forward on its own, so it's worth setting deliberately.

Every doc on a transaction lives in one list. Sort it the way you work, and Pipeline remembers your choice on every transaction after that.

See [Transaction Docs List](#)

Choose What the List Shows

Sorting orders the rows; the columns decide what you're ordering on in the first place.

Show the fields your job runs on and hide the rest. Your column choices are personal to you, and Pipeline holds them for next time.

See [List Column Preferences](#)

List Sorting Troubleshooting

Running into a problem? Start here.

- [My List Sort or Columns Aren't What I Set](#)
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