

Transaction Flags FAQ

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A Transaction Flag is a saved search that marks every matching transaction on your Transactions page, in red, green, or blue. Answers to the common questions about flagging one specific deal, how many flags you get, who else can see them, and how a flag differs from a shortcut.

Can I flag one specific transaction?

Not directly — a flag follows criteria, not a click. There's no per-transaction flag to switch on, so the way to single one deal out is to give it something a search can find, then flag that. Adding a marker to the transaction name is the usual move — a word like *DUAL*, or an emoji at the front of the name — and a flag built on that name catches it and anything else you mark the same way later.

How many flags can I have?

Three — one each in red, green, and blue. You choose the color when you save the search, so it's worth spending them on the three things you most want to catch mid-stride rather than on views you'd rather look up on purpose.

Can anyone else see my flags?

No — flags are personal. Agents and admins each save and see their own, so a flag changes what stands out to you on your Transactions page without changing anything for the rest of the office.

What's the difference between a flag and a shortcut?

A shortcut gives you the list when you ask; a flag marks the rows in place. Both save a search you'd otherwise rebuild, so pick by how you want to be told: a shortcut for the view you deliberately open, a flag for the thing you want to notice while you're doing something else.

Can I flag a document?

Not with a Transaction Flag — use Doc Labels or Doc Comments instead. Flags work on transactions, not on the docs inside them. A color-coded doc label marks a document and can be searched and sorted on; a doc comment sends the agent a note about it.

Learn More

Some transactions need watching. Save the search that finds them as a flag, and Pipeline marks every match on your Transactions page for you.

See [Transaction Flags](#)

Still Have Questions?

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