Transaction Flags

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

Introduction

A Transaction Flag is a search you've saved with a colored flag attached to it. Once it's saved, any transaction meeting that search shows the flag beside it on your Transactions page — no maintenance, no list to keep, nothing to remember to check.

That makes flags the right tool for the transactions you want to catch *while you're working*, rather than the ones you go looking for. Closings that slipped past their date, listings expiring next week, a lender you're watching, pending deals with commissions still not entered.

Flags are personal. Agents and admins each save their own, and yours mark your view of the list.

How It Works

A flag is a saved search wearing a color. You describe the transactions you care about once; Pipeline does the matching from then on.

You Define the Criteria, Pipeline Does the Marking

Whenever a transaction meets the criteria you set for a flag, Pipeline shows that flag next to it on your Transactions page. You never flag a transaction by hand — you describe the kind of transaction you want flagged, and Pipeline marks the matches for you.

Three Flags to Choose From

Flags come in red, green, and blue. Pick the color when you save the search, and give it a name you'll recognize later.

Anything You Can Search, You Can Flag

Flag criteria are ordinary transaction searches, so the range is wide: transactions added today, status changed to closed this month, listings expiring next week, pending transactions closing this month with incomplete checklists, a specific agent's deals, transactions involving a particular lender, or docs carrying a label like *Missing Sigs*.

Your Flags Are Yours

Agents and admins can save, view, and remove their own flags. What you flag shapes what you spot on your own list — it isn't a mark on the transaction for the rest of the office.

Flags and Shortcuts Are the Same Idea, Two Payoffs

Both save a search you'd otherwise rebuild. A shortcut hands you the list when you ask for it; a flag marks the matching rows in place, so you notice them without asking.

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

Save a Transaction Flag

> Turn a transaction search into a colored flag that marks every matching transaction from then on.

> **Who Can Do This**: Agents and admins, for their own flags.

To save a transaction flag:

1. Click [Transactions] from the top menu.
2. Search for the transactions that meet the criteria you want to flag.
3. Once your search results appear, click [Save Search].
4. Choose the red, green, or blue flag to represent them, then name your flag.
5. Click [Save Flag].

From here on, any transaction meeting those criteria carries that flag next to it on your Transactions page.

View Your Flagged Transactions

> Spot the transactions your flags have marked, right in your normal list.

> **Who Can Do This**: Agents and admins, for their own flags.

To view your flagged transactions:

1. Click [Transactions] from the top menu.
2. Look for the colored flag beside each transaction.

A flag beside a transaction means it currently meets the criteria you saved under that flag.

View a Flag's Criteria

> Check what a flag is actually looking for, and see everything matching it right now. You can also reach this while saving a search — click the crossed-out flag, then [View Search].

> **Who Can Do This**: Agents and admins, for their own flags.

To view a flag's criteria:

1. Click [Transactions] from the top menu.

2. Click the flag next to a flagged transaction.

3. Read the search criteria set for the flag in the *Search* area.

Pipeline lists every transaction currently meeting that criteria below the search — a quick way to sanity-check a flag that's marking more or less than you expected.

Remove a Transaction Flag

> Stop using a flag you no longer need. You can't edit a flag, so this is also how you change one — remove it, then save a new one.

> **Who Can Do This**: Agents and admins, for their own flags.

To remove a transaction flag:

1. Click [Transactions] from the top menu, run any search, then click [Save Search]. The flags you're already using appear crossed out.

2. Click the crossed-out flag you want to stop using.

3. Click [View Search] to confirm it's the right one — Pipeline lists the transactions currently meeting it, along with its criteria.

4. Click [Remove Flag].

The flag stops appearing beside your transactions. Nothing about the transactions themselves changes.

Transaction Flags FAQ

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. See Transaction Flags FAQ.