

Global Search FAQ

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Global Search reaches every transaction you have access to, in any status, from one box in the upper-left corner. Answers to the common questions about what it searches, which fields you can scope to, and what it won't match.

Where is Global Search?

In the upper-left corner of every page in Pipeline. You don't have to be anywhere in particular to use it — click into the box and search from wherever you are.

What does Global Search look through by default?

Each transaction's Address, MLS, Agent, Seller, and Buyer fields, all at once. Any transaction with your term in any one of those comes back.

Can I search inside just one field?

Yes. Click into the box and a menu of fields opens — pick one, type your term, and Pipeline searches only there. That's the fix when a plain search returns far too much.

Will Global Search find a closed or fell-through transaction?

Yes — Global Search looks across every status. Closed, fell-through, and expired deals come back alongside active ones, which is why it finds transactions that have dropped off your Transactions list.

Can I find every transaction for one agent?

Yes — scope to [agent:] and search their name or email address. The email address is the more reliable of the two if their name is stored in an unusual format.

Can I search by a contact, like a lender or title company?

Yes. Use [contact:] for a person and [contact-company:] for their company. You'll get every transaction that contact was added to, with the count at the top of the list.

Can I search by a document name or a doc label?

Yes — use [doc:] for a document name and [doc-label:] for a label. The results are the transactions those docs sit on, not the docs themselves.

Can I search by a custom field?

Yes. Custom fields you've added to your transactions are searchable, so a parcel number or an internal file number you track yourself is findable the same way an address is.

Can I search by phone number?

No. Phone numbers aren't searchable. To find someone's transactions, search their name or email address as a contact instead.

Why doesn't search find an address I typed slightly differently?

Because matching is exact — Pipeline looks for the characters you typed, not for something close. Abbreviations, extra spaces, and alternate spellings all break the match. Search a shorter, distinctive piece instead: the street number on its own, or one unusual word from the name.

Can I save a search I run every week?

Yes — save it as a shortcut. Once your search is on the screen you can save the criteria to your Custom Shortcuts menu and run it again in one click, which is a better fit than Recent Searches for anything you do regularly. See [Custom Shortcuts](#).

Can I download my search results?

Admins can. After you've searched, download the resulting list as a transaction spreadsheet to work with it outside Pipeline. Agents can search their own transactions but can't download the list.

Who can use Global Search?

Everyone, scoped to what they can already see. Global Search never widens your access — it only reaches the transactions your permissions already give you.

Learn More

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See [Global Search](#)

Still Have Questions?

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