

Global Search

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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.

Introduction

You're after a transaction that isn't on the list in front of you. It closed two springs ago, or it's filed under a name you can't quite recall, or you're deep in something else and you'd rather not lose your place to go looking for it.

Global Search is the box that reaches the rest of the account. It sits in the upper-left corner of every page in Paperless Pipeline, so it's there whatever you're in the middle of, and it looks past whatever list you happen to be on to every transaction you can see. Give it a name or an address and Pipeline checks the main transaction fields together. Pick a single field from the menu instead and it searches only there, which is the move when a broad term brings back more than you can read.

One box reaches any file in the account, live or long closed, and using it doesn't cost you the page you're on. And if a search comes back empty, it's far more often a matching problem than a missing transaction, which is a much easier thing to fix.

How It Works

One box, two modes — search everything at once, or scope to a single field when a wide search returns too much.

What One Search Looks At

Type a term without picking a field and Pipeline checks each transaction's **Address, MLS, Agent, Seller, and Buyer** fields at once. Status is no barrier — closed, fell-through, and expired deals come back alongside the live ones, so a listing you closed three years ago is one search away.

Searching Inside One Field

Click into the box and a menu of fields opens. Pick one and Pipeline searches only there, which is the move when a broad term brings back more than you can read. Custom fields you've added are searchable too, so a parcel number you track yourself is as findable as a street address.

Field	What it searches
agent:	One agent, by name or email address
contact:	A person added to the transaction as a contact
contact-company:	That contact's company
name:	The transaction name
doc:	A document name
doc-label:	A doc label

What Comes Back

Transactions, whatever you searched by. Search a doc label and you get the transactions holding a doc with that label; search a lender's company and you get the transactions that lender worked on. The count shows at the top of the list.

Search Across Every Field

Type a term into Global Search to look across each transaction's Address, MLS, Agent, Seller, and Buyer fields in one go.

Who Can Do This: All users, for the transactions they have access to.

To search across every field at once:

1. Click inside the Global Search box in the upper-left corner of any page in Pipeline.
2. Enter all or part of your search term.
3. Click the [Search] icon, or press [Enter].

Every transaction with your term in its **Address, MLS, Agent, Seller, or Buyer** field appears in the results, of any status.

Search Within One Field

Pick a single field — an agent, a contact, a document name, a doc label — and search inside just that one.

Who Can Do This: All users, for the transactions they have access to.

To search within one field:

1. Click inside the Global Search box in the upper-left corner of any page in Pipeline. The field menu opens.
2. Select the field you want to search within — for example, [agent:] to find one agent's transactions, or [doc-label:] to find every transaction carrying a particular label.
3. Enter all or part of your search term. For an agent or a contact, an email address works as well as a name.
4. Click the [Search] icon, or press [Enter].

Only transactions where your term appears in that field come back, with the count at the top of the list. Scoping to one field is the fix when a wide search returns too much — a street number searched across every field also matches every MLS number that contains it.

Narrow Your Results Further

Once your results are on the Transactions page, the search options there let you layer on status, dates, side, and location — and take the finished list out as a spreadsheet.

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 Search You Run Often

Recent Searches will hand back something you ran a minute ago, but anything you come back to week after week is better saved outright.

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](#)

Global Search FAQ

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.

See [Global Search FAQ](#)

Global Search Troubleshooting

Search coming back empty, or coming back with far too much? Start here.

- [Why Can't I Find a Transaction or Agent in Search?](#)
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