

# Type-Ahead Search

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Start typing on your Home page and your active transactions narrow as you go — click one and you're in it.

## Introduction

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You're on the phone and you need the file. Not a search page, not a list to scroll, the actual transaction, now, while the person is still talking.

Type-ahead search is the fastest route to a deal you're working on today. Start typing on your *Home* page and matching transactions narrow as you go, so you can click straight into one without submitting anything or waiting on a results page. It's deliberately narrow: it looks at the deals that are live right now, which is what makes it quick and what stops a closed file from three years ago getting in the way.

The call ends with the file open rather than with a promise to look it up. When you need the wider net, including anything closed or expired, that's what the full search is for.

## How It Works

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One field, one job: get you into an active transaction in a couple of keystrokes.

## Where It Lives

It's the **Search Active Transactions** field on your Home page.

## It Narrows as You Type

Matching transactions appear the moment you start typing and keep narrowing with every character. There's nothing to submit — when you see the one you want, click it.

## It Matches the Transaction Name

Type any part of the name and Pipeline matches on that. Unlike Global Search, this field doesn't reach into the agent, seller, buyer, or MLS fields.

## Active Deals Only

Type-ahead search covers transactions in Active, Listing, and Pending status. Closed, fell-through, and expired deals don't appear here — that's the single most common reason a transaction you expected doesn't show up.

## Matching Is Exact

Like the rest of search, Pipeline matches the characters you type rather than something close to them. If an address was stored in a different shape than you're typing it, try one distinctive piece — the street number, or one unusual word.

## Find an Active Transaction from Your Home Page

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Type a few characters of a transaction's name and pick it out of the matches as they narrow.

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

To find an active transaction from your Home page:

1. Click [Home] from the top menu.
2. In the **Search Active Transactions** field, type any part of the transaction's name. Matching transactions appear as you type.
3. Click the transaction you want.

You land on that transaction. If nothing matches, the deal may be closed, fell through, or expired — search for it in Global Search instead, which covers every status.

## Find a Deal That Isn't Active

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This field is short-sighted on purpose: live deals only, matched on the transaction name and nothing else. A file that closed, fell through, or expired won't appear here, and neither will one you're trying to find by the agent, the seller, or the MLS number.

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](#)

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