Answer How Many and How Much for the Monday Meeting

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How many listings did we take, how many went under contract, how many closed, and what was it worth. The search box answers all four — the count at the top of the results is the report.

Introduction

There is no monthly summary report in Pipeline, and offices spend a surprising amount of time looking for one. What there is instead turns out to be faster: filter the Transactions page to exactly the deals you mean, and Pipeline tells you how many there are without downloading anything.

The whole skill is picking the right date to filter on. A transaction has several, they answer different questions, and choosing the wrong one is why a search sometimes comes back empty when you know the deals exist.

When to Use This

- Your broker wants last month's numbers before the Monday meeting.
- You need listings taken and contracts opened as two separate figures.
- You're reporting closings and sales volume for a quarter.
- You searched a date range and got nothing back, even though you know those deals happened.
- Some of your closed statuses aren't showing up when you search for closed deals.

1. Pick the Date That Answers Your Question

Four dates, four different questions.

- **Added On** — when the transaction was created. This is "how many deals did we open."
- **Listed On** — when the listing was taken. This is "how many listings did we sign."
- **Accepted On** — when the offer was accepted. This is "how many went under contract."
- **Close Date** — when it closed. This is "how many did we close."

Get this wrong and the answer is quietly incorrect rather than obviously empty, which is worse. A search on Added On for March returns the transactions *created* in March — not the listings taken that month, some of which were entered in February.

2. Filter and Read the Count

Open the search options on the Transactions page, set the status or statuses you want and a custom range on your chosen date, and search. The number at the top of the results is your answer — no download, no 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]

> Status searches see the *current* status, not the one a transaction had at the time. Searching for Pending with a date range last spring returns nothing, because those deals have since closed. To ask what was under contract in a past period, filter on Accepted On instead and leave status out of it.

3. Select a Whole Status Category at Once

Most offices grow more than one closed status — *Closed*, *Closed — Rental*, *Closed — Referral* — and picking one of them silently leaves the others out.

In the status dropdown, the bolded grey-blue header above each group is itself selectable. Click **Closed** at the header level and every status inside that category is included, so a closing is a closing however your office labelled it.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See [Transaction Statuses]

4. Get the Dollars From the Spreadsheet

Counts come off the screen; money comes out of the download. Download your search results as a spreadsheet and sum the column you need — **Sale Price** in column U for volume, **Commission Amount** in column V for commission. Because the download is of your search results, the totals cover exactly the period you filtered.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See [Transaction Spreadsheet Downloads]

> Offices running the Commission Module get these figures without the spreadsheet — its reports carry closings, commission, and sales volume by period, by agent, and by lead source.

5. Save It So Next Month Is One Click

You'll run this again in thirty days. Save the search and it sits in your left menu waiting; change the date range and the rest of the filter is already built.

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]