Transaction Search

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Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

Introduction

Finding one deal is the easy half. The harder question is usually a list: every file one coordinator is carrying, everything that closed last month, all the listings that expire this week.

Search on the Transactions page works on the list rather than jumping you to a single record, and that's the distinction worth holding onto. It's built for the questions that have more than one answer: how many, whose, by when. What you can narrow by is what a deal already carries, so you're not building a report from nothing. You're pointing at the part of your own list that matters right now, then ordering it so it reads.

So counting what you closed last month, or balancing work across coordinators, becomes a search instead of a spreadsheet somebody keeps by hand. And unlike the list you land on, a search here reaches deals of every status, which is why a closed or expired file that seemed to have vanished turns up the moment you go looking for it.

How It Works

Searching a list is a few layers deep: a quick search to get close, more options to refine, a sort to order the result, and a download to take it with you.

Quick Search on the Page

The search box at the top of the Transactions page looks across each transaction's*Address*, *MLS*, *Agent*, *Seller*, and *Buyer* fields at once, then shows every transaction that matches.

More Search Options

Click [Search] to expand the advanced search area, where you can filter by specific fields and stats — side, status, close date, commission, and more. Combine criteria to build a targeted list, like one agent's residential deals closing this week.

Every Status Is Included

Whenever you search on the page, Pipeline looks across transactions of *all* statuses — active and inactive. So a search will surface closed, expired, and canceled deals right alongside live ones.

Sort and Download

Sort the result by any field to order it your way, and — if you're an admin — download the list as a spreadsheet to work with it outside Pipeline.

Search the Transactions Page

Find transactions by Address, MLS, Agent, Seller, or Buyer, all in one search.

Who Can Do This: All users can search the transactions they have access to.

To search the Transactions page:

1. Click [Transactions] from the top menu.
2. In the search box at the top of the page, enter all or part of your search term.
3. Click the green [Search] icon, or press [Enter].

Pipeline searches each transaction's *Address*, *MLS*, *Agent*, *Seller*, and *Buyer* fields and returns every transaction where your term appears in any of them — of any status.

Refine with More Search Options

Filter your list by specific fields and stats, and combine criteria for a targeted result.

Who Can Do This: All users can refine the transactions they have access to.

To refine with More Search Options:

1. From the top of the Transactions page, click [Search] to expand the search area.
2. Select or enter your criteria for any field in the shaded search area — for example, a side of *Listing*, a status, or a close-date range.
3. Click the green [Search] button.

The matching transactions appear in the list. Add more criteria to narrow further, or clear them to widen back out.

Sort Your List

Order the list by the field that matters most to the task in front of you.

> **Who Can Do This**: All users can sort the transactions they have access to.

To sort your list:

1. From the top of the Transactions page, click the [Sort] tab.

2. Select the field you want to sort by. The list reorders by that field.

> Sorting by a field that isn't already a column will add it to the page, in place of the *Close Date* column, so you can see the values you sorted on.

Download Your Search Results

> Take your searched-and-sorted list out of Pipeline as a spreadsheet.

> **Who Can Do This**: Admins.

To download your search results:

1. Run your search and sort so the list shows exactly what you want.

2. Click [Download].

3. Choose [Include only displayed columns] for just the columns on the page, or [Include all transaction columns] for every field.

4. Click [Download Search].

You'll get a spreadsheet of your results. Hidden columns aren't included when you choose "Include only displayed columns."

Transaction Search FAQ

The Transactions page searches by name and filters by any field, across every status. Answers to the common questions about what the search box covers, filtering by status, and searching from anywhere. See [Transaction Search FAQ].