Transactions List

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The Transactions page lists every transaction you have access to — shaped by the columns you pick, the order you sort, and the scope you set.

Introduction

Most of the day you aren't hunting for one particular deal. You're looking at all of them at once, working out what needs attention before lunch. That's the job the Transactions page does.

It's your working view of the account rather than the whole of it: the transactions your role covers, laid out in a table you can shape. The columns are yours to choose, so the page can show close dates for a coordinator and commission figures for a broker without either of them scrolling past the other's fields. What you set sticks between visits, because a list you have to rebuild every morning isn't a list anyone keeps using.

So you open the page and it already looks like your job. And if a deal you know exists isn't showing, it almost certainly hasn't gone anywhere. The page leads with live work and keeps finished deals out of the way until you ask for them, and widening the view brings them straight back.

How It Works

Think of the Transactions page as a table you can shape. You decide what it shows and how wide the net is; searching and sorting narrow it further.

Active Transactions, By Default

Out of the box, the list shows only active transactions. Closed, expired, and canceled ones are hidden to reduce clutter. Click [View All] to bring the inactive ones back into view.

The Columns You Choose

Use [Columns] to show the transaction fields that matter to your workflow and hide the ones that don't. Your choices stick, so the page shows what you care about each time you open it.

Recent Lists in the Sidebar

The left menu keeps a few quick-access lists — like *Recently Updated* and *Recently Created* — so the transactions you're most likely to reopen are one click away.

Searching, Sorting, and Downloading

To narrow the page to an exact set of transactions — by agent, status, close date, and more — use the search and sort options on the page. See Transaction Search. Admins can download whatever list is showing as a spreadsheet.

Show or Hide Columns

Pick which transaction fields appear as columns on the Transactions page.

Who Can Do This: Anyone who can view the Transactions page.

To show or hide columns:

1. Click [Transactions] from the top menu.
2. Click [Columns].
3. Check the columns you want to see, and uncheck the ones you don't.
4. Click [Done].

The page now shows only the columns you checked. Unchecked fields still live on each transaction — they're just hidden from this view.

View All Transactions

Show every transaction, including the closed, expired, and canceled ones hidden from the default list.

Who Can Do This: Anyone who can view the Transactions page.

To view all transactions:

1. Click [Transactions] from the top menu.
2. Click the [View All] link to display all transactions, including inactive ones.

The list now includes deals of every status. To focus back on active work, run a search or return to your active list.

Put Your Own List in the Left Menu

Recently Updated and Recently Created are Pipeline's picks, and they're the same for everybody. The list you actually work from is usually narrower — your own pendings, one office's closings — and right now you set it up by hand each time you land here.

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

Transactions List FAQ

The Transactions page shows your active deals by default, with columns and scope you control. Answers to the common questions about missing closed deals, choosing columns, and downloading your list. See Transactions List FAQ.