Get the Most Out of the Help Center

Type your question the way you'd ask a coworker, and search brings up the articles that match.

Introduction

Most things in Pipeline have more than one article, and each one answers a different question. Say an agent can't see a document:

- **How does it work?** *Document Access*
- **How do I fix it?** *Why Can't an Agent See a Document?*
- **How do I hide a document on purpose?** *Keep Each Side's Documents Private on an In-House Deal*

The title tells you which one you've found. A title that names something explains how it works. A title that asks a question fixes a problem. A title that starts with an action, like Keep or Set Up, walks you through it step by step.

Search in Your Own Words

The search box is at the top of every page. It looks through everything we've written, not only the titles.

To search the Help Center:

Click the search box.

Type what's going on in a few words, like *agent can't see document*.

Results show up as you type. Above each one, you'll see where it's from. If it says Troubleshooting, it's a fix.

Tip: If your own words don't find it, type the name you see on the screen instead, like Unassigned Docs or Transaction History.

Search One Part of Pipeline

When you're reading an article, there's a menu next to the search box that says **All categories**. Change it to what you're working on, like Documents, and you'll only get results about that.

Find Your Place in an Article

You rarely need to read a whole article. These get you to the part you need:

- **On This Page.** The list on the right shows every section. Click one to jump to it.
- **Also.** Under that list, you'll find the fixes and step-by-step guides that go with the article.
- **The links at the top.** They take you back to other articles on the same subject.
- **Previous and next.** At the bottom, they take you to the article before or after it.

If you're reading about something and what you really want is to fix it, scroll to the bottom. The fixes are listed there.

Tip: To send someone to one section, click it in **On This Page**, then copy the link from the top of your

browser. It opens right at that section.

Start From What You Can See

Sometimes you don't know what something is called. Start from what's in front of you:

- **The screen you're on.** By Page has a page for each screen in Pipeline and explains what's on it.
- **A setting you're looking at.** By Settings explains every setting in Admin / Settings and in your own profile.
- **Your role.** I am an Agent and I am an Admin walk you through Pipeline in the order you'll need it. You'll find both at the top of the home page.
- **A whole deal.** How a Transaction Moves Through Pipeline follows one deal from the listing agreement to the CDA.
- **Something you need to get done.** Ways to Use Pipeline has step-by-step guides for real jobs, like getting a new office set up.

Go Past the Basics

Once you know your way around, the Pro Guides show you the shortcuts experienced admins use every day.

The moves that turn a long list into a short morning: saved searches, keyboard shortcuts, messages you build by dragging, and names that do the matching for you.

See Work Pipeline Like a Power User

Catch Up on What Changed

What's New has every update since 2021, newest first. If a screen looks different than you remember, the latest update tells you what changed and where to read more.

When Search Comes Up Empty

If nothing comes up, we probably call it something different than you do.

When search doesn't find it:

Try again with fewer words, or with the name you see on the screen.

Go to the home page, click the area it belongs to, like Documents or Transactions, and look through the list.

Click [Get Help] at the top of any page or the bottom of any article.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help

At the bottom of every article, **How did we do?** lets you rate it. If an article didn't help, pick the unhappy face.

Some questions are about how your office does things, not how Pipeline works: which checklist to use, what to name a document, who reviews what. Someone in your office can answer those faster than we can.

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact