Keep Your Account Clean and Easy to Read

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Most of what makes Paperless Pipeline hard to read gets typed in by your own team or left behind on a settings list. Name things one way, show only the columns you read, file finished deals where they drop off, and clear out the choices nobody picks anymore.

Introduction

A Transactions list where half the names are addresses and half are client names. A checklist where every task carries a sentence of notes. A status dropdown still offering a pending status named after a coordinator who left two years ago. Nothing in that account is broken. It just takes longer to read, every day, for everyone.

Pipeline keeps its pages plain on purpose, and most clutter starts with the three names your team types most: transaction names, document names, and task names. Each one has a place where you set the pattern once. After that comes what you see: the columns on the pages you open all day, and the status categories that decide which deals the Transactions page shows.

Then there are the lists behind the dropdowns, which only ever grow. A short clean-up a few times a year keeps every dropdown down to choices someone still uses. Most of it is master admin work, and none of it deletes a transaction.

When to Use This

- Canceled and withdrawn deals are still on everyone's active Transactions list months after they died.
- Your status dropdown carries names built around people, like a pending status for a coordinator who has since left.
- The same form comes in under several names, and the document name list has grown past anyone reading it.
- A printed Tasks or Transactions list comes out squished, or the Tasks page tells you you've hit the column limit.
- Nobody can find a property by searching, because every agent names transactions their own way.

1. Name Every Transaction the Same Way

The transaction name is the most-read text in Pipeline. It's what your list shows, what a search looks through, and what anyone outside your office matches a file against. Pick one pattern, usually the full property address with the street number first, and put an example of it where people type. A master admin writes the instruction once under [Admin / Settings], and it shows in red under the name field whenever anyone adds or edits a transaction. It's a reminder rather than a rule, so a name that breaks the pattern still saves.

Show your team a naming reminder right under the transaction name field, so files are named your way every time.

See Transaction Naming Instructions

Choosing the pattern, the placeholder for a buyer file with no address yet, and who handles renames are all in Get

Every Transaction Named Your Office's Way. If your office marks names with emoji, keep to the short key inBuild an Emoji System Your Whole Office Can Read.

2. Give Every Form One Name

A purchase agreement arrives under four different names unless there's a list to pick from. Standardized document names are that list. A master admin builds it once, pasting in up to 50 names at a time. From then on the names come up as suggestions wherever anyone uploads, assigns, renames, merges, or breaks apart a doc. Each name can carry its doc label and permission category, so picking the name files the doc as well. There's one list for the whole account, so when offices handle different forms, put a short prefix at the front of each name.

Build a shared list of your company's document names, and everyone on your team names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

Naming a doc from that list takes two or three keystrokes, and the suggestions are grouped by permission category. How to work it is in Type a Few Letters Instead of Scrolling.

3. Keep Task Names Short

A checklist gets read over and over, one line at a time, by someone looking for the next thing to check off. A task name is a plain text field, so it will hold a status note or a paragraph of instructions. A short note is sometimes worth it, like who you spoke to at the inspection company. Keep notes like that few and brief. When a task needs real instructions, put them in a document on your Reference page and name the task in a few words. Numbering, required and optional markers, and the rest of the task-name conventions are in Make a Long Checklist Readable.

The tasks on a checklist are the documents to collect and the steps to finish on a transaction.

See Document Names or Tasks to Track

4. Hide the @Mention Text You Don't Need to Read

An @mention highlights a task for the person it names. Once the highlight tells you which tasks are yours, the mention text is more words on the line. Hide it. On a transaction, click [⋮] at the top of the Checklists area, check [Hide @mention], and click [Done]. On the Tasks page, click the @ icon. Pipeline remembers the choice for you, and nobody else's view changes. How the highlight fits with doc labels and emoji is in Make the Important Thing Stand Out.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

5. Show Only the Columns You Read

The Transactions and Tasks pages are the two you open most, so their columns are worth a minute. Click [Columns], check the fields your job runs on, clear the rest, and click [Done]. A hidden field is still on every transaction. It's out of your view and nothing more. The choice belongs to your login in the browser you use, so your teammates keep theirs, and a private browser window starts fresh every time. The Tasks page takes up to four extra columns. Printing takes only the columns you're showing, which is also how you fix a printed list that comes

out squished.

Show the fields your job runs on and hide the rest. Your column choices are personal to you, and Pipeline holds them for next time.

See List Column Preferences

The Unassigned page works differently. Its columns are fixed, and a narrow browser window drops the less-used ones until you widen it. Shaping the Transactions page into a report you can save, share, or download is in Turn Any Page in Pipeline Into a Report.

6. File Finished Deals Where They Drop Off the List

The Transactions page opens on live deals only. What makes a deal live is the category behind its status, never the status name. Pipeline ships seven categories. Active, Listing, Pending, and Other keep a deal on the list. Closed, Fell Through, and Auto Expiry take it off. A Canceled status someone filed under Other keeps every deal carrying it on everyone's list. A status can't change category once it exists, so the fix is a new status in the right category, the old one deactivated, and the deals moved across.

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

See Transaction Statuses

The whole clean-up, from the audit to the last deal moved, is in Keep Your Active Transactions List Clean. A finished deal is still in your account. Click [View All] or search for it and it's back on screen.

7. Retire the Statuses, Labels, and Doc Names Nobody Picks

Every choice in a dropdown is one more line to read past, and these lists only grow. Go through them a few times a year. All of them are under the [Gear] in the upper-right corner, then [Admin / Settings], and all but doc labels are master admin work.

- Transaction statuses: click the [gear] beside a status nobody uses and choose [Deactivate Status]. Transactions already carrying it keep it, nobody can pick it for a new one, and once no transaction uses it Pipeline removes it. A status named after a person is ready to retire the day that person leaves.
- Transaction labels: a label can be renamed or removed. It can't be deactivated, and renaming one can stop a checklist from arriving, because checklist rules read the label.
- Document names: delete the names of forms your offices no longer use. They come off one at a time, and deleting a name also clears the permission category attached to it. Add any new forms in the same visit.
- Doc labels: there are always 14, so the clean-up is renaming. Rename a color when your process changes and every doc already wearing it picks up the new name.

Before you rename or remove a label, open the checklist templates that aim at it and update their rules.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules

The contact role dropdown fills up the same way, one new spelling at a time. Clean Up Your Contact Roles List folds the variations back into one set.

8. Trim the Commission Lists Too

If your office runs the Commission Module, three more lists feed commission entry: Agent Fees, Client Fees, and Deductions, all in the Financials section of the [Admin / Settings] menu. A fee your office stopped charging still waits in the dropdown for whoever enters the next closing. To remove one, a master admin clears its name and clicks [Save Settings]. It stops appearing on new commission entries, and amounts already recorded on past transactions stay as they were. While you're there, look for the same charge set up as both a client fee and a deduction. Change the default amount in one place and the other keeps filling in the old figure.

Client fees are the list most likely to hold that duplicate.

When a buyer or seller pays something on top of the commission, that's a client fee — collected at closing and routed to your brokerage or to the agent.

See Client Fees