Build Any List Your Broker Asks For

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Every "how many" and "which ones" question about your deals is a search on the Transactions page: set the criteria, read the count at the top, and save the search so the answer stays current.

Introduction

The questions that reach a support desk most often are small ones. How many did we close last month. Which of one agent's deals were on the listing side. Which files got an email this week. Which closings are missing from the commission report. None of them has a report of its own, and none of them needs one.

The Transactions page is the report. Power Search gets you close from anywhere in Pipeline. The search area on the page narrows the list by status, date, side, location, label, commissions, and checklist state, and the count at the top of the results is the figure you were asked for. Criteria stack, so each one you add takes the list closer to the deals you mean and nothing else.

You end up asking Pipeline the question instead of keeping a spreadsheet by hand. The list you build re-runs itself once you save it, and it downloads when the answer has to go to someone else.

When to Use This

- Your broker wants last month's closings before the Monday meeting and you're counting rows by hand.
- An agent says her closed deals have vanished, because the Transactions page shows only what's live.
- Your office has three closed statuses, and a search on one of them leaves the other two out.
- The Commission & Closings report shows fewer closings than you know happened, and you need the deals it skipped.
- You want the transactions that received an email this week, and Pipeline doesn't notify you when one arrives.

1. Read the Page You Land On

The Transactions page opens on live work: the deals whose status sits in your Active, Listing, Pending, or Other category. Closed, fell-through, and expired transactions aren't gone. Click [View All] at the top of the list to bring them into view, or search for one, because a search reaches every status whether or not you clicked anything. At the top of the list, Pipeline prints how many transactions matched. That number is the report for any "how many" question, and it changes with every criterion you add.

The search area on the page folds away. Click [Search] to open More Search Options, and click it again to collapse it. Pipeline remembers which way you left it, so someone who rarely searches keeps a clean page and someone who searches all day keeps the criteria open.

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.

See Transactions List

2. Get Close With Power Search

The box in the upper-left corner reaches every transaction you can see, from any page. Type a street name and Pipeline checks address, MLS, agent, seller, and buyer at once. Pick a field from the menu first and it searches only there. Use name for the transaction name, buyer or seller for a party, and agent for an in-house agent. Use note for a word inside a note or email on the transaction, doc for a document name, creator for whoever added the transaction, and zip for a zip code. Your results land on the Transactions page with the count at the top, and More Search Options there narrows them further. Searching inside one field, and picking a search back up from [View Recent Searches], are walked through in Use the Features People Write In to Ask About.

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Power Search

3. Stack Criteria Until Only the Deals You Mean Are Left

One filter answers a simple question. Two or three answer the one your broker asked. In More Search Options, each field narrows what the others left. You can set a status or a whole status category, a date type with a range, and the side your office held. You can add a location, a transaction label, whether commissions have been entered, and whether the checklist is complete. One agent's deals is a list. One agent's listing-side deals closing this year is an answer.

To build a combined search:

1. Click [Transactions] from the top menu, then click [Search] to open More Search Options.
2. Set the criterion that cuts the most first, such as a status category or a date range.
3. Add the next criterion, and the next, until the list holds only the deals you mean.
4. Click [Search].

The count at the top is your figure, and the rows under it are the detail. Every dropdown in the search area takes typing: click Status, type the first letters, press Enter, and move to the next field, as Type a Few Letters Instead of Scrolling shows. The incomplete-checklist search, with the hover that lists what each file is missing, is worked through in See Which Files Are Behind Without Opening Each One.

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

4. Pick the Whole Status Category, Not One Status

Your office names its own statuses, and most offices grow more than one of a kind: Closed, Closed - Rental, Closed - Referral. Search on one and the others are left out without a word. Pick the whole category at its header in the Status dropdown, or All Active for everything live, the way Answer How Many and How Much for the Monday Meeting shows. A status search matches a transaction's status now, not the status it held last spring.

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

See Transaction Statuses

5. Choose the Date Type, Then Let the Range Roll

Date searches start with a date type, and the type is the question, so pick the one that matches what you were asked, as Answer How Many and How Much for the Monday Meeting lays out. Then pick the range. This Month, Last Month, This Week, Last Year, and Last 365 Days are relative ranges, and a custom range takes two dates. Choose a relative range whenever one fits. It saves typing today's dates, and it's what keeps a saved search current: a shortcut stores the question, so Close Date This Month saved in January is still this month's closings in June. Email Received with Last Week is the search offices run to see which transactions got mail, since Pipeline doesn't notify you when an email lands on a transaction.

Once the list is right, save it as a shortcut in your left menu, as Build the Saved Views Your Office Works From Every Morning shows. A search for an emoji in a transaction name works the same way and saves the same way, and Build an Emoji System Your Whole Office Can Read is the guide for that.

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

6. Reconcile a Commission Report Against the List

On the Commission Module, a financial report counts a transaction only when three things are true at once: its status sits in the Closed category, its Close Date falls in the period, and commissions have been entered with a CDA generated. So when the Commission & Closings report comes back short, the missing deals are nearly always closed transactions nobody entered commissions on. The Transactions page finds them.

To reconcile a report against your closings:

1. Run the report for the period and note how many rows it holds. Each row is one transaction.
2. On the Transactions page, open More Search Options, select the Closed category at the header level, set Close Date to the same period, and click [Search].
3. Compare the count at the top with the report. A matching count means the report is complete.
4. If the count is higher, add the commissions-not-entered filter and search again. The rows that remain are the deals the report skipped.
5. Enter commissions on each one and run the entry through to the CDA. Each deal joins the report against its own close date.

The monthly version of that sweep, with the other blanks worth hunting, is in Find the Deals With Something Missing.

The closed-business record — every closed transaction in your period, with the commission and fees your company collected and what it paid back out.

See Commission & Closings

Agents run the same check on their own numbers. The Detailed version of their Your Commissions report lists each transaction that contributed. A search of their own closed deals for the same period shows which closing is missing from it. Entering the commissions on that deal is admin work rather than theirs.

Agents can pull their own commission figures without asking anyone. It sits in your personal profile, labeled Your Commissions.

See My Commissions Report

7. Sort It, Shape It, and Take It Out

Once the list holds the right deals, sort it, choose its columns, and download it as a spreadsheet, all of which Turn Any Page in Pipeline Into a Report walks through. On a long page, your browser's find command highlights every match of a word on the screen. Windows: Ctrl + F. Mac: Cmd + F.

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

See Transaction Spreadsheet Downloads

8. Keep the Same Kind of View on Tasks and Unreviewed

Shortcuts on the Tasks page arrived by mid-2022; until then a browser bookmark was the only way to keep a filtered Tasks view, and it isn't needed now. The same [Add Shortcut] saves a search, filter, and sort on the Tasks and Unreviewed pages, and every shortcut lands in the one Custom Shortcuts menu. On Tasks, filter to Your @ Tasks, or to one agent's key dates due this month, and save it. On Unreviewed, a broker who reviews only contracts filters by doc label, sorts oldest first, and saves the view, because that page starts fresh on every visit. Get the Unreviewed Page Down to What Actually Needs You sets up the labels that make that filter work.

Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.

See Tasks Search

The Unreviewed page carries its own search, filters, and sortable columns, so a list hundreds of docs long becomes the handful you want to work first.

See Unreviewed Docs Search