Use the Features People Write In to Ask About

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The moves support hears about most, because the person who finds them is so glad they did: New Offer used the right way, a search that lands on the right field, a shortcut that keeps your sort, an agent's check that means "ready for review", and a task set aside instead of faked.

Introduction

Some of Pipeline's best moves are the ones people ask about after months of working around them. Someone calls to ask how to keep a fallen-through deal separate from the new buyer's, or how to find one agent's deals without every address that shares their name, or how to tell which tasks an agent says are done. Each has an answer that has been there all along, and each time the answer lands the same way.

Five of them are here in full, with the one thing about each that people usually miss. The others that come up as often, name matching, drag-and-drop, templates, scheduling, and emoji, have guides of their own, and the last section points to them.

None of it needs setting up. It is all in your account now, and most of it is one habit away.

When to Use This

- A deal fell through and you are not sure whether to reuse the transaction or start a new one.
- You searched for an agent by name and got every transaction with that word in the address.
- Your Transactions list forgets the sort you want every time you come back to it.
- Agents check off tasks and you cannot tell what is finished from what they say is finished.
- A checklist task does not apply to this deal and someone is tempted to check it off anyway.

1. Use New Offer for the Second Offer, Not the First

The listing gets its own transaction, and the first offer lives on it. When that offer falls through and another comes in, move the transaction to your Fell Through status so the dead deal's documents and messages stay together, then click [New Offer] in the left menu. Pipeline creates a linked transaction that carries the listing side across and leaves the old buyer's paperwork behind, ready for the new buyer, the new tasks, and the new outside agent. The mistake support sees most is using New Offer for the first offer, which leaves one deal spread over two transactions.

Restart a deal or take the next offer as a new transaction, linked to the one before it.

See New Offers

A contract dies, the property goes back on the market, and every page of listing paperwork is still perfectly good. New Offer moves you forward without rebuilding the file.

See Deal Falls Through, New Offer on the Same Listing

2. Search Inside One Field, Then Narrow on the Page

The search box in the upper-left corner looks across address, MLS, agent, seller, and buyer at once, which is why searching a common surname returns every street with that name. Click into the box and a menu of fields opens. Pick agent-last and type the name, or doc to find every transaction holding a document with a given name, or note to find the message you sent this morning. The results land on the Transactions page, where More Search Options narrows them further by status, close date, side, or location.

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

The same box remembers what you ran. Click into it and choose [View Recent Searches] to run this afternoon's search again without retyping it.

Pipeline keeps the searches you've just run, so you can pick one back up without rebuilding it.

See Recent Searches

3. Save the Search, the Sort, or Both

Once the list is right, click [Add Shortcut] and it sits in your left menu, re-run fresh each time you click it. A shortcut keeps whatever you did on the page: a search, a filter, a sort, or all three together. A sort on its own counts. If you live on the Transactions page and want it ordered by close date every morning, sort it once, save the shortcut, and stop re-sorting.

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

4. Read an Agent's Check as "Ready for Review"

When an admin checks a task it is complete. When an agent checks the same task it becomes agent-checked, with its own mark, and it stays open until an admin closes it. That mark is the agent saying their part is done. Agent-checked tasks stay on the admin's Tasks page and show in orange in the admin's daily reminder, and the Tasks page filter [Agent Checked] lists only those, which is the shortest route to a morning's approvals. Open the transaction to see the work in context, then check the task to complete it or uncheck it to send it back.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See Agent Checked Tasks

5. Let Agents Set Aside What Does Not Apply

A task that does not fit this deal should not be checked off as if it were done. Hold Shift and click the task's box, then choose [Not Applicable]. From an agent that is a signal, and the task stays open until an admin resolves it by checking it off, which leaves it struck through, or deleting it. From an admin it applies at once. A Not Applicable task still counts as open on the Tasks page and in the overdue reports until an admin acts, by design, so the call always

passes a second pair of eyes.

Some tasks on a checklist just don't apply to a given deal — mark them Not Applicable to set them aside without pretending they're done.

See Not Applicable Tasks

6. The Rest of the Favorites Have Their Own Guides

Click a document and the matching task highlights, drag a contact or a task straight into a message, and find anything on a long page with Ctrl + F or Cmd + F: those are in Work Pipeline Like a Power User. The ten message templates a coordinator sends every week are in Build the Message Templates Your Office Sends Every Week, and the scheduling that used to be a sneak peek is in Put Your Transaction Emails on a Schedule. The emoji system that turned out to be the most-adopted move of all is in Build an Emoji System Your Whole Office Can Read.