Where the Work Waits

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Every page in Pipeline is a queue for one kind of work. Knowing which page holds which is most of running an office.

Introduction

Transactions holds the live deals, Tasks holds every deadline, Unassigned holds documents that have arrived and not yet been filed, and Reference holds the forms your office hands out.

The Unassigned page is also where the assign permission shows its effect. Grant it to agents and they file their own documents; keep it to staff and an admin sees every document before it lands on a transaction.

1. Shape the Transactions List to Your Job

Active deals by default, every deal with View All. Pick the columns that answer your questions and the page opens that way from then on.

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. Work Every Deadline From One Page

Every task with a due date across every transaction. Agents see their own, you see your agents', and the filters bring the ones that need you to the top.

The Tasks page gathers every task with a due date across all your transactions in one place — shaped by the columns you show and the order you sort.

See Tasks List

3. Watch What Has Arrived

Everything emailed in lands here first, carrying who sent it and the subject it came under. Each person's general maildrop address sits at the top of this page, and it is the one to program into a scanner.

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

4. File It Onto the Deal

Assigning sets the transaction, the name, and the permission category in one step. A blue Assign button already knows its transaction; a green one is yours to choose.

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See Doc Assignment

5. Keep the Office's Forms in One Place

Post the blank forms, disclosures, and links once and everyone in the account finds the same current copy. A form sent from here leaves a record that it was sent.

Your company's Reference page is the shared library — the blank forms, disclosures, training material, and links an admin posts once so nobody on the team has to hunt for them.

See Reference Library & Forms

6. Save the Search You Run Every Morning

A search and sort you run often becomes one click in your left menu. It stays live, so it shows what matches today rather than what matched when you saved it.

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