Work a Transaction the Way the Pros Do

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Open Pipeline on any device, edit a transaction from the keyboard, read its history instead of guessing, sort tasks your way, and set up the company settings that make every new file start right.

Introduction

A transaction in Pipeline is a page most people use the same way every day. They open it, scroll it, and click what they need. It also answers a lot of questions people write to support about, and it can be set up so every new file arrives with the dates, prompts, and expiry behaviour your office wants.

Some of that is in your hands on any transaction: a keyboard shortcut to the edit page, the Transaction History that records who did what and when, a personal sort that puts tasks in due-date order. Some of it lives in company settings only a master admin sees, where a few checkboxes add the dates your contracts run on, decide what happens when a listing expires, and pre-fill the free-text fields with the prompts your team should answer. And because a transaction is a private folder with permissions and a checklist, it can hold files that are not deals at all.

You end up with fewer clicks on every file, answers you can look up instead of ask for, and new transactions that start the way your office needs them to.

When to Use This

- Your agents ask whether there is a Pipeline app for their phone.
- You want to know when a status changed, who deleted a checklist, or when a doc arrived, without asking anyone.
- The checklist order the admin set is not the order you work in.
- Contract dates such as earnest money due have nowhere to live on the transaction.
- A listing's expiration date vanished when the deal went pending and nobody knows why.
- You keep licenses, contractor agreements, and renewal dates in a filing cabinet or a spreadsheet.

1. Open Pipeline on Whatever Is in Your Hand

There is no Pipeline app to download and no need for one. The pages resize themselves to the screen, so the same account works on a laptop, a tablet, and a phone in a client's kitchen. On a phone the left menu moves to the top of the page. Add Pipeline to the home screen and it opens with one tap like any app.

Open Pipeline in your phone's browser, and add an icon to your home screen to get back in with one tap.

See Pipeline on Mobile

2. Add and Edit From the Keyboard

Ctrl + Alt + T on Windows, or Ctrl + Option + T on a Mac, opens a new transaction from any page. On an open transaction, Ctrl + Alt + E, or Ctrl + Option + E on a Mac, takes you to the edit page. While adding or editing, Tab

moves you from field to field, the arrow keys move through a dropdown, Enter selects, and a date field takes a typed date.

Add a transaction, upload docs, jump between pages, and page through a preview from the keyboard.

See Keyboard Shortcuts

3. Read the History Before You Ask

Every transaction keeps a record of every action taken on it since it was created: what changed, who changed it, and when. Click [Transaction History] in the left menu of any transaction. Search it by the type of update, the person, or the time period, and the question of when a checklist was removed or a status changed is answered in a few seconds.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

For a long history, your browser can find a word on the page. Press Ctrl + F on Windows or Cmd + F on a Mac, type *checked* or *status*, and every matching line is highlighted.

4. Sort Tasks in the Order They Are Due

An admin sets the order of tasks on the checklist template. On a transaction you can see them your own way. Click the [⋮] menu at the top of the Checklists area, check [Sort by date], and click [Done]. Tasks now run in due-date order for you on every transaction you open, until you uncheck it. Nobody else's view changes.

The Checklists area is where a transaction's checklists live — expand them, reorder them, and set how they display.

See Checklists Panel

Dragging a single task into a message only works with Sort by date switched off, so turn it off for a moment when you need that.

5. Find an Agent's Transactions by Side or by Start Date

To see the deals where one agent is the listing agent and not the buyer's agent, click into Power Search in the upper-left corner, choose the listing-agent field, and type the agent's name. Choose buying-agent for the other half. The plain agent field returns both sides, and the side filter in More Search Options narrows any list the same way.

To keep a closer eye on your newest agents, search by when they joined. In More Search Options, set the date type to Agent Start Date and pick a range, such as Last Year or a custom range. The list is every transaction belonging to an agent who started in that window, which is the report an office needs when it reviews every file from agents in their first two years.

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

6. Add the Dates Your Contracts Run On

Pipeline has extra contract date fields you can turn on, and you can build your own when a date you need is missing, as covered in Track the Contract Dates Your Deals Run On.

Turn on prebuilt fields like inspection dates and earnest money to track the details your team cares about.

See Optional Fields

Build the fields your office needs, and Pipeline treats them like every other transaction detail.

See Custom Fields

7. Decide What Happens When a Listing Expires

By default Pipeline expires listings on their expiration date, and that same setting decides whether the date survives a status change, so weigh the trade in Decide Whether Pipeline Should Expire Your Listings.

Let Pipeline retire a listing on its expiration date, so nothing lingers on your active list past the day the agreement ended.

See Automatic Listing Expiration

8. Pre-fill the Prompts Every New File Should Answer

More Info, Admin Info, and Commission Summary are free-text fields on every transaction. A master admin can give each one default text that appears on every new transaction, such as Lockbox #: _____ or Commission %: _____, so the person opening the file knows what the office wants there. It is only pre-filled text, and anyone working the transaction can edit or clear it. Admin Info stays visible to admins only.

Pre-fill the More Info, Admin Info, and Commission Summary fields on every new transaction so nothing important gets forgotten.

See Default Field Values

9. Keep Agent Files in Pipeline Too

A transaction is a private folder with permissions, a checklist, and a history, which makes it a good home for the paperwork that is not a deal: independent contractor agreements, license renewals, continuing-education deadlines. Name each one for the person, put them in their own location so only the right staff can see them, file sensitive documents in a permission category the agent cannot open, and apply an onboarding or renewal checklist so the expiration dates land on your Tasks page with reminders.

Independent contractor agreements, license renewals, mentorship agreements — the paperwork that isn't a deal still needs a home with real permissions. A transaction can be that home.

See Use a Transaction to Store Files That Aren't Deals