Type a Few Letters Instead of Scrolling

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Almost every list in Pipeline narrows as you type. Two or three letters, then Enter, and the doc is named, the contact is picked, the template is loaded, and the filter is set.

Introduction

A long list is a small tax you pay all day. Forty standard document names, thirty message templates, every role anyone has ever typed on a contact, a status menu you have to read top to bottom before you can pick one. You scroll, you read, you click, and then you do it again on the next field.

You do not have to scroll any of them. Every one of those lists filters down to what matches the moment you start typing, whether or not the field looks like it wants text. Type two letters of a doc name and the list is three names long. Type the first word of a template and the rest vanish. Type the first letter of a status and press Enter.

The habit pays back most for people who would rather stay on the keyboard, but it changes something for everyone: the lists stop being something you read and become something you ask. Nothing here needs setting up, and a few of the lists get smarter the more your office uses them.

When to Use This

- Your standardized document names run to dozens and naming a stack of docs means reading the same list over and over.
- The message template picker has grown past the point where you can find one at a glance.
- The contact role dropdown holds every spelling of every role anyone ever added.
- You set the same status, label, and location filters on the Transactions page by mouse every time.
- You are entering transactions all day and want to tab through the form without touching the mouse.

1. Name a Doc in Two Keystrokes

Wherever you name a document, whether you are uploading it, assigning it from Unassigned, renaming it, merging, or breaking a packet apart, your office's standardized document names appear as suggestions. When a doc comes in, the name field is already highlighted, so you start typing without clicking anything. Type any part of the name and the list filters down. Two letters usually leave you with one or two choices. The match does not have to be the start of the name, so *coastal* finds the Coastal Area Property Addendum as fast as *co* finds it.

The suggestions are grouped by permission category, with the names that belong to the category you have selected at the top. Pick the category first and the right names are already in front of you. Every name from every category stays selectable, and you can still type a name that is not on the list.

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

A document signed through Pipeline eSign comes back to Unassigned already pointed at its transaction, and you name it from the same list when you assign it.

2. Build Task Names From the Same List

When you type a task name into a checklist template, Pipeline suggests your standardized document names there too. Type *mold* and the Mold Disclosure name is offered. Take it, and the task and the doc share a name, which is what makes them highlight each other on the transaction.

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

How the name matching pays off on the transaction is in Work Pipeline Like a Power User.

3. Pick a Contact by Role, Then by Name

Contact suggestions start from the role. Type a few letters into the Role field and the roles your office has used narrow to match. Pick one, then start typing the person's name and Pipeline offers the people you have used in that role before, with their company, email, phone, and fax ready to fill in. The list is keyed to the role, so type the role first; there is no way to search across roles by name or phone number.

Type a few letters and Pipeline offers the people you've already worked with, details and all — so a repeat escrow officer or lender lands on the transaction without retyping a thing.

See Auto-suggested Contacts

Roles are free text, so a new one exists the moment you type it and is suggested from then on. That is also how the list fills up with variations, and a master admin can merge or hide the ones nobody should pick again.

A Contact Role says what someone does on the transaction — buyer, lender, escrow officer, attorney. Type a new one once and Pipeline offers it back to you the next time.

See Contact Roles

4. Find a Template by Its First Word

The message template picker on a transaction narrows as you type, even though it looks like a plain dropdown. Type *key* and only the templates with *key* in the name remain.

Save a message you send often, then reuse it in a couple of clicks the next time a transaction needs it.

See My Templates

Because the picker filters on what you type, the way you name templates becomes the way you file them. Templates cannot be put in folders, so put the grouping at the front of the name instead. *Listing - Intro*, *Listing - Under Contract*, *Sale - Intro*. An office with two locations can prefix by location the same way. Anyone who types the prefix sees only that set.

The same trick works inside a template. The autofill tag list narrows as you type a field name, so *today* finds the Today tag without scrolling.

Autofill Tags let Pipeline do the typing. Drop a tag into a message template and the transaction's own details fill

themselves in every time you send.

See Autofill Tags

5. Type Into the Dropdowns Too

The lists that look like fixed menus take typing as well. On the search and filter bars of the Transactions, Tasks, Unassigned, and Unreviewed pages, click a dropdown such as Status or Label, type the first letters of the value you want, and press Enter. *acc* and Enter sets Accepted. *co* narrows to Condo and Co-op, and the up and down arrow keys move between them. The permission category on a doc works the same way: click the field, type *s*, press Enter, and the doc is in Sale.

The same holds on the Add Transaction form and the Assign Agents section, so a coordinator entering deals can type the address, tab to Status, type a letter, press Enter, tab to Label, and keep going without reaching for the mouse. It also holds on the Reference page when you file a document into a long list of categories.

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

When you meet a dropdown anywhere in Pipeline, try typing into it before you scroll it.

6. Jump to a Deal Without a List

The Search Active Transactions field on your Home page narrows your live deals as you type, and one click opens the file. It covers Active, Listing, and Pending transactions and matches on the transaction name, which is what makes it fast.

Start typing on your Home page and your active transactions narrow as you go — click one and you're in it.

See Type-Ahead Search

For a closed deal, or a search by agent, seller, buyer, or MLS number, the Power Search box in the upper-left corner of every page reaches every transaction, and clicking into it opens a menu of fields so you can search inside just one.

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

7. Ask the Help Center in Your Own Words

The search box in the Help Center narrows to matching articles as you type, so a specific question usually has its answer on screen before you finish typing it. Type the name of the feature, or the thing you are trying to do, and open the article that matches.

When your own words don't find it, there are other ways in, like starting from the screen you're on.

Type your question the way you'd ask a coworker, and search brings up the articles that match.

See Get the Most Out of the Help Center

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help