Work Pipeline Like a Power User

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The moves that turn a long list into a short morning: saved searches, keyboard shortcuts, messages you build by dragging, and names that do the matching for you.

Introduction

Most of a day in Pipeline is the same few motions repeated. You run a search, open a transaction, read a document, write a message, go back to the list, and start again. None of those takes long. All of them add up.

Each one has a shorter way that the screen does not advertise. A search you run every morning can be saved and re-run in one click. A transaction can open beside your list instead of on top of it. An email address, a doc comment, or a task can be dragged into a message instead of retyped. And the names you already give documents and tasks can point your team at the right one without anyone scrolling.

What you end up with is the same work in fewer clicks, and a list you never lose your place in. Everything here is already in your account and needs nothing turned on.

When to Use This

- You rebuild the same Transactions search every morning, or the built-in Closing in 30 Days shortcut disappeared from your left menu and you want it back.
- You open a deal from a list, make one change, click back, and have to find your place again.
- You type the same email addresses into the composer, or copy task lists into a message by hand.
- Your Tasks page shows the whole office's work and you cannot tell which tasks are yours.
- A subject line reads wrong because the transaction name is pinned to the end of it, or a recipient's mail server rejected the message.

1. Save the Searches You Run Every Morning

Pipeline used to ship a set of built-in shortcuts, Closing in 30 Days and Overdue Closings among them. Those were retired in February 2024. What replaced them is better, because you choose the question. Run the search once, filtered and sorted the way you want it, and save it. From then on it sits in your left menu and re-runs fresh each time you click it, so a close-date range keeps rolling forward on its own.

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

To get Closing in 30 Days back, filter the Transactions page to active deals with a close date in the next 30 days, sort by close date, and click [Add Shortcut]. You can keep eight, and they work on the Transactions, Tasks, and Unreviewed pages.

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

2. Work a List Without Losing Your Place

When you need to touch every deal on a list, do not open them one at a time from the list itself. Open each in its own tab and leave the list where it is.

To work down a list in separate tabs:

1. Run the search or open the shortcut that gives you the list.
2. Right-click a transaction name and choose [Open link in new tab]. Holding Ctrl (Windows) or Cmd (Mac) while you click does the same thing.
3. Make your change in that tab, then close it with Ctrl + W or Cmd + W.

The list is still there, exactly as you left it, ready for the next one.

The Unreviewed page does this for you. Click the transaction name next to a doc and the transaction opens in a new window, with the list still open behind it. On two monitors, drag that window to your second screen and review the doc against the rest of the file side by side.

Every doc assigned to a transaction lands on the Unreviewed list and stays there until an admin signs off on it — one running worklist of what's outstanding across your whole office.

See Unreviewed Docs List

3. Move Around Without the Mouse

Two shortcuts cover adding work, and seven more jump to any top-menu page. The pair most people pick up first: **Ctrl + Alt + T** starts a new transaction and **Ctrl + Alt + D** opens an upload to Unassigned Docs. On a Mac, hold Ctrl + Option instead. They work from any page.

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

See Keyboard Shortcuts

When the signed contract is already in hand, the fastest new transaction skips the form. Upload the PDF and run Pipeline AI Create on it; it fills the fields and you review what it pulled.

Upload a signed contract and a filled-in transaction comes back — AI Create does the typing, so you review what Pipeline pulled, add what's missing, and save.

See Pipeline AI Create

Inside a document preview, the keyboard moves you through pages. With your cursor outside any text field, the left and right arrow keys step one page at a time, and typing a page number jumps straight to it. Type 1 then 3 and you are on page 13 of the listing agreement.

Click a doc's name and it opens right there on the page — read it, page through it, and keep working without downloading a thing.

See Doc Preview

4. Build a Message by Dragging Instead of Typing

The message composer on a transaction accepts more than text. Almost everything already on the transaction can be dragged into it.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

Open [Note / Email] on the transaction, then drag from the sections above it:

- **A contact, into the Send To An External Email Address field** addresses the email to them. Once a contact is on the transaction with an email address, you never type it again.
- **A contact, into the message body** pastes their full details into the message, which is how you hand the inspector's number to the buyer.
- **A doc comment, into the message body** carries the whole comment across: the doc name, what was written, who wrote it, and when.
- **One task, into the message body** adds that task with its due date and any doc comments attached to it. To send a whole group instead, use the options below the message box to append every incomplete, completed, or overdue task.

Appended tasks follow task visibility, so a recipient sees only the tasks they would see inside Pipeline.

5. Keep the Transaction Name Out of a Subject Line

When you send from a transaction, Pipeline adds the transaction name to the end of your subject. Most of the time that is what you want. When it is not, start the subject with a pipe character, the | key above the backslash, and Pipeline leaves the name off.

Reach for it when the name would confuse an outside recipient, when a transaction name holds an emoji that a mail server rejects, or when you want the name out of the *Documents for* header on a message with attachments.

Every email Pipeline sends for you leaves from one of our addresses with your name on it. Which address, what the recipient sees, and where their reply lands all depend on who you sent it to.

See Outgoing Email

6. Let Names Do the Matching

A checklist task and a document are linked by name. When a doc's name is contained in a task's name, Pipeline treats them as a pair: hover over the task and the matching doc highlights, click the doc and the matching task highlights. On a long checklist that saves the scroll to find the task a doc satisfies.

The pairing depends on how you name things. If the task is *Review HOA Documents* and the doc is *HOA Documents*, they match. If the doc is *HOA Docs*, they do not. Set your standardized document names and your task names from the same list, and the highlighting works on every transaction the checklist reaches.

The same list pays off twice more. Pipeline AI Create files the source document on the new transaction under a standardized name, so it arrives already paired with its task. A document signed through Pipeline eSign comes back to Unassigned pre-assigned to its transaction, and giving it the standardized name as you assign it pairs it the same way.

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

7. Tag the Work That Is Yours

An @mention in a task name marks whose task it is. The task turns green for that person on the transaction, on their Tasks page, and in their daily task reminder email. Show Each Person Only the Tasks That Are Theirs lists the ways to write a mention for a person or a role.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

On the Tasks page, filter by Your @ Tasks and everything that does not mention you drops away. Save that view as a shortcut and you are back at step 1, with your own list one click from Home every morning. Work Your Own Task List From One Page walks through that filter and shortcut.

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