# Home

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The first page after you sign in: what needs attention today, the deals you were just in, and one box that reaches any file in the account.

## Introduction

Home is a dashboard rather than a list. Its counts are live and scoped to what you can reach, so an agent and an admin see different numbers on the same tiles.

Everything on it is a shortcut to somewhere else. The tiles open the work they count, the search box opens any transaction, and the left menu holds the searches you have saved.

## The Tiles Across the Top

### Read the Counts

Closings this week, tasks due today, docs waiting on you. A tile at zero means nothing is waiting on you specifically, and a hidden tile stays hidden next time.

Your Home page opens on a row of live counts: closings this week, tasks due today, docs waiting on you — so you can see what needs attention before you click into anything.

See Stat Tiles

### Pick Up Where You Left Off

Your last five transactions, kept by Pipeline as you open them. Anything older is a search away.

Recently Viewed keeps your last five transactions one click away on the Home page, so picking up where you left off doesn't mean searching for it again.

See Recently Viewed

### The Message at the Top

One short message a master admin posts to every Home page in the account, with a link if it needs one. It is the one place something reaches everyone at once.

Post a short message to the top of everyone's Home page to share news, a reminder, or a link with your whole team.

See Company Announcement

## The Search Box

### Reach Any Transaction

The box in the upper-left corner looks across every field of every transaction you can see, live or long closed.

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

### Narrow as You Type

Start typing on Home and your active transactions filter down with each letter. It matches the transaction name and shows active deals only.

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

### Run a Search Again

The searches you have just run stay listed so you can pick one back up. A search you run every week belongs in a shortcut instead.

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

See Recent Searches

## The Left Menu

### Your Saved Searches

A search and sort you saved as a shortcut sits in the left menu on every page, and it runs live each time you click 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

### Where to Ask

Help in the top-right corner reaches our team with your account details already attached, and a real person reads it.

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