Transactions

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The working list of the account: every deal you have access to, shaped by the columns you pick and the scope you set, with the tools to add one, mark one, and take the list out.

Introduction

The Transactions page shows active deals by default and hides finished ones until you ask for them. What you see depends on your role: agents see the deals they are on, admins see their locations.

The list is a table you shape. Columns, sort, and search all stick between visits, and the shape you make is the shape you can download.

The List

What Is on It and How It Reads

Active deals by default, every deal with View All, and the columns you choose. The page opens the way you left it.

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

Find the Deals You Mean

Search by name from the page, filter by any field, sort the result. Every status is included when you search, so a closed deal comes back too.

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

Adding One

Open a New Deal

The button sits in the upper-right corner of every page. A location, a name, a status and, where your account requires one, a label are all it needs to save; the rest fills in as the deal moves.

Add a new transaction to start tracking a listing or sale in your company's Pipeline account.

See Adding a Transaction

Bring In Past Deals

[Import Transactions] in the left menu turns a spreadsheet of past deals into transactions, a batch at a time. Most offices use it once, when they move in.

Import your past transactions from a spreadsheet, up to 50 at a time.

See Transaction Imports

Marking and Removing

Flag the Ones to Watch

Save the search that finds them and Pipeline marks every match on the page for you. Your flags are yours alone.

Some transactions need watching. Save the search that finds them as a flag, and Pipeline marks every match on your Transactions page for you.

See Transaction Flags

If One Was Deleted

Deleting a transaction is permanent on your side and it will not be in your backup. Our team can often recover a recent one when you tell us what to look for.

Deleted a transaction by mistake? Our team can often bring a recently deleted one back — here's how recovery works.

See Transaction Deletion

Taking the List Out

Download What You Shaped

Search and sort the page first, then download exactly that list. There is a limit of a thousand transactions per file.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

The Other Lists That Download

Your user roster and a transaction's checklist timeline come out as their own spreadsheets, and changes made in the file stay in the file.

Some of Pipeline's lists come out as their own spreadsheet — your user roster and a transaction's checklist timeline, ready to work with offline.

See List Downloads

The Left Menu

Your Saved Searches

A search you run every morning becomes one click here. It stays live, so it shows what matches today.

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