Viewing Docs

Quickly access the documents you need — whether they're shared office forms, waiting in Unassigned, tied to a transaction, or waiting for admin review.

Introduction

Documents live in different areas of Pipeline, depending on where they are in your workflow. Each area plays a key role in helping your team stay organized, efficient, and compliant.

- **Reference Docs** store your office's standard forms, templates, and shared resources. This central library keeps everyone on the same page and using the most current versions.
- **Unassigned Docs** hold files that haven't yet been added to a transaction. Use this space for incoming documents you're not ready to process or that need to be assigned by an admin.
- **Transaction Docs** are added directly to transactions, where your team shares, reviews, and tracks them for compliance.
- **Unreviewed Docs** show what still needs attention. Brokers and admins can quickly find and review pending docs without digging into individual transactions.

No matter where you're working, Pipeline gives your team fast access to the right documents—and the tools to act on them without switching pages.

View Reference Docs 1

Quickly access your office's shared forms, templates, and links — organized by category and ready to preview, download, or email.

Who Can Do This: Anyone

Go to the Reference Page

- Click [Reference] from the top menu.

Browse and Find Docs

- Expand or collapse categories to focus on what you need.
- Scan for familiar doc titles.
- Use the **i** column to identify the type:
  - PDF or other document file
  - Link

- Pipeline eSign Form

- Use the sort and search options to narrow down the list.

Take Action

- From here, you can preview, download, or email a doc (outlined below).

Preview a Reference Doc

Click the doc name to open a preview. If it's not a PDF, click [Open PDF] to view it in your browser.

Download a Reference Doc

Click the gear icon next to the doc, then select [Download]. The doc will be downloaded to your computer.

Email a Reference Doc

Send docs directly from the Reference page. **Learn how to Email Docs**

Admins: You can manage this library. Learn how to **Manage Reference Docs**.

How to View and Use Reference Docs in Paperless Pipeline

Quickly access your office's shared forms, templates, and links — organized by category and ready to preview, download, or email.

Who Can Do This: Anyone

Go to the Reference Page

- Click [Reference] from the top menu.

Browse and Find Docs

- Expand or collapse categories to focus on what you need.
- Scan for familiar doc titles.
- Use the **i** column to identify the type:
  - PDF or other document file
  - Link
  - Pipeline eSign Form

- Use the sort and search options to narrow down the list.

Take Action

- You can preview, download, or email a doc from the Reference Page.

Preview a Reference Doc

Click the doc name to open a preview. If it’s not a PDF, click [Open PDF] to view it in your browser.

Download a Reference Doc

Click the gear icon next to the doc, then select [Download]. The doc will be downloaded to your computer.

Email a Reference Doc

Send docs directly from the Reference page. **Learn how to email reference documents in Pipeline**

Admins: You can manage this library. **Learn how to manage Reference Docs**

View Unassigned Docs

View Unassigned Docs to review files that have been uploaded but haven’t yet been tied to a transaction—especially helpful for admins or transaction coordinators.

Who Can Do This: Agents and admins with access to Unassigned Docs can view their own. Admins can view Unassigned Docs across the office.

To view Reference Docs:

Go to the Reference Page

- Click [Reference] from the top menu.

Browse or Filter Reference Docs List

- Scan doc names and labels for quick recognition.
- Expand or collapse categories to focus on what matters.
- Use the **search options** to find a specific doc fast.

Take Action

- From here, you can take action on the document as needed (outlined below).

Preview a Reference Doc

Click the name of the doc to preview it.

If the doc is not a PDF, select [Open PDF] to open it in your browser.

Download a Reference Doc

Click the doc's gear, then [Download]. The doc will be downloaded to your computer.

Email a Reference Doc

Email docs from the Reference Area...

Learn how to Email Docs (Reference Docs)

Admins can manage Reference Docs. **Custom Reference Library Management**

- View Transaction Docs

- View Transaction Docs to work with everything tied to a specific deal—contracts, disclosures, signed forms, and more—all in one place.

- **Who Can Do This**: Anyone with access to the transaction can view its docs, depending on the permission category set on each document.

- To view Reference Docs:

Go to the Reference Page

- Click [Reference] from the top menu.

Browse or Filter Reference Docs List

- Scan doc names and labels for quick recognition.
- Expand or collapse categories to focus on what matters.
- Use the **search options** to find a specific doc fast.

Take Action

- From here, you can take action on the document as needed (outlined below).

Preview a Reference Doc

Click the name of the doc to preview it.

If the doc is not a PDF, select [Open PDF] to open it in your browser.

Download a Reference Doc

Click the doc's gear, then [Download]. The doc will be downloaded to your computer.

Email a Reference Doc

Email docs from the Reference Area...

Learn how to Email Docs (Reference Docs)

Admins can manage Reference Docs. **Custom Reference Library Management**

- ## View Unreviewed Docs

- View Unreviewed Docs from a single page to quickly review, comment on, and mark documents across multiple transactions—without needing to open each transaction individually.

- **Who Can Do This**: Only users with review permissions—typically brokers, managers, or compliance staff—can access the Unreviewed page.

- To view unreviewed docs:

  Open the Unreviewed page

  - Click **[Unreviewed]** from the top menu (only visible if you have permission to review docs).

  Browse the list

  - You'll see all unreviewed docs across your office. Use filters to narrow by agent, transaction, or doc type.

  Open a doc

  - Click a doc name to view, comment, or review the document.

  Take Action

  - From here, you can **mark as reviewed**, **leave a comment**, or take other actions like **replace** or **split** the doc.

- ## What You Can Do From Any Doc

- Once a doc is added to Paperless Pipeline, you can take action based on your permissions. Learn how to manage docs with the following guides:

- **Manage Docs**
- **Share Docs**
- **Comment On Docs**
- **Rotate Docs**
- **Break Apart Docs**
- **Merge Docs**
- **Review Docs**
- **Enter Docs**
- **Delete Docs**