Managing Transaction Docs

Checklists ensure compliance by tracking tasks for transactions using admin-defined templates. These templates can be added to transactions manually or automatically and customized for each transaction.

Introduction

Stay in control of every signature request you've sent without needing to track emails, chase signers, or guess what's still pending.

From one organized view, you can see every request you've sent, when it was sent, and whether it was sent from a specific transaction or the Reference Library. For each request, you'll know who has signed, who hasn't, and what stage the process is in.

Need to take action? You can do it instantly. Send reminders, cancel requests, download PDF copies for your records, and keep your list tidy so you can stay focused on what still needs attention.

Add Docs

Upload Docs

Learn how to Upload Docs

Maildrop Docs

Learn how to Maildrop Docs

View Docs

Learn how to View Docs

Rename a Doc

Rename a doc on a transaction..

Who Can Do This:

To rename a doc:

Go to the Transaction

- Open the transaction where you need to take action.

View the Docs List

- Scroll to the *Docs* section to see all docs, grouped by *Permission Category*.

Find the Doc to Rename

- Click the doc's gear, then select [Edit Doc].

Name Docs

- Type the *Doc Name*.
- Start typing the name, and select it from your company's list of Standardized Doc Names. Your company's preferred name and settings will be applied automatically.
- If no Standardized Doc Name exists, type the complete doc name.

Save Settings

- Click [Save].

Label a Doc

Unassign a Doc from the Transaction

Delete an Unassigned Doc

Delete a document from the Unassigned Page.

Who Can Do This: Users with *Upload Docs* permission can delete any docs they personally uploaded to the Unassigned Page.

To delete an Unassigned doc:

Go to the Unassigned Page

- Click [Unassigned] from the top menu.

Choose the Doc to Delete

- Find the doc you want to delete.

Delete the Doc

- Click the gear icon next to it and select [Delete].
- Click [Delete] again to confirm.
- The doc will be removed from the Unassigned Page but remain recoverable.

Delete a Transaction Doc

Delete a document from a transaction.

Who Can Do This: Agents can delete docs they personally added to the transaction and admins can delete any doc, as long as it hasn't been marked Reviewed. Once a doc is Reviewed, only admins with *Delete Any Docs* permission can delete it.

To delete a doc from a transaction:

Go to the Transaction

- Open the transaction where you need to take action.

Choose the Doc to Delete

- Find the doc you want to delete.

Delete the Doc

- Click the gear icon next to it and select [Delete].
- Click [Delete] again to confirm.
- The doc will be removed from the transaction but remain recoverable.

Recover a Deleted Doc

Recover a deleted document from the Unassigned Page or a transaction.

Who Can Do This: Agents can recover docs they personally deleted. Admins can recover any deleted docs.

Go to Deleted Docs

- Click [Deleted Docs] from the Unassigned Page or from inside the transaction where the doc was deleted.

Choose the Doc to Recover

- Find the doc you want to recover.

Download the Doc

- Click [Download] next to it.
- The doc will be downloaded to your computer.

Optionally, Upload Again

- If you need to fully recover the document in Paperless Pipeline, you can upload it again.