AI Doc Review

AI Doc Review scans your transaction documents for errors, missing fields, inconsistencies, and items that need a second look — giving you and your team a structured starting point for every document review.

Introduction

AI Doc Review is an add-on feature in Paperless Pipeline that checks real estate transaction documents for errors, missing signatures, blank fields, inconsistent entries, contradictory elections, and other issues — then presents the results organized by page and severity so your team can act on them immediately.

It gives you a head start before you sit down to review a file. Agents can use it to check their own documents before submitting. Admins, coordinators, and other staff can use it to move through file reviews faster and catch issues earlier.

Start a scan on any assigned document. It runs in the background. When it's done, Pipeline lets you know. Open the results and you'll see exactly what needs attention — each issue tied to a page, categorized by severity, and described in plain language.

Check issues as you go. Keep notes on what matters. Email them to whoever needs to act.

How It Works

Run a scan on any transaction document, continue working while it processes in the background, then open the results to review each issue by page and severity — checking them off, saving notes, and sharing what needs follow-up.

Start an AI Doc Review

From a transaction, click the *AI Doc Review* icon next to any assigned document. You can scan multiple documents at once. Each scan runs in the background.

Get Notified

When a scan is complete, Pipeline notifies you with a banner. You can also opt in to receive an email.

Check Issues

The *AI Doc Review* presents each page's issues one at a time, each with a severity level, title, and description. Check off each issue as you review it. If something needs follow-up, copy it to your notes. When all issues on a page are checked, you'll move to the next page automatically.

View Summary

The *Summary* view shows the total issue count, page-by-page status, and notes you've collected.

Keep & Share Notes

Copy issues to your notes as you go, or add your own from the *Summary* view. Edit any note before sharing. Email or copy them when you're ready.

Give Feedback

From the review panel, share feedback on anything the AI got wrong or could do better.

AI Doc Review Severity Levels

AI Doc Review assigns each finding one of three severity levels: Errors, Warnings, and Checks. Errors are the most critical and flag required fields that are visibly incomplete. Warnings flag important issues like contradictions, placeholders, or dates out of sequence. Checks flag lower-priority items worth confirming before the document moves forward.

Errors

The most critical findings. *Errors* flag items like a missing signature from a named party, blank party names, a missing property address, or a blank primary financial amount. These represent fields that are required and visibly incomplete.

Warnings

Important findings that need attention. *Warnings* flag items like a missing closing date, contradictory or dual-marked elections, placeholder values (e.g., "TBD" or "test"), dates out of logical sequence, content entered under an unchecked option, or a signature present but its date left blank.

Checks

Items worth a second look. *Checks* flag items like missing initials, an empty broker or agent block, a default election taking effect because no box was checked, or an entry that may be illegible. Lower priority, but worth confirming before the document moves forward.

Start an AI Doc Review

Start an *AI Doc Review* scan on any document that has been uploaded and assigned to a transaction.

Who Can Do This: Anyone with access to the transaction whose company is subscribed to *AI Doc Review*.

To start a scan, open a transaction, click the *AI Doc Review* icon next to any assigned document, confirm how many pages will be used, and click Start AI Review — the scan runs in the background while you keep working.

Go to the Transaction

- Open the transaction containing the document you want to review.

Start the Scan

- Find the document in the doc list.

- Click the *AI Doc Review* icon next to it.

To scan multiple documents, click the *AI Doc Review* icon next to each one. Each scan runs independently in the background.

Confirm & Start

- A confirmation window will show the document name and how many of your remaining pages the scan will use.

- Optionally, check [Email me when the review is ready] to receive an email when the scan is complete.

- Click [Start AI Review].

Continue Working

- The scan runs in the background. You can navigate away and continue working in Pipeline.

- When the scan is complete, a banner will appear from wherever you are in Pipeline. If you opted in, you'll also receive an email.

Want an email notification while you wait? Click the *AI Doc Review* icon while the scan is in progress to opt in.

Check AI Doc Review Status

The *AI Doc Review* icon on each document reflects where it is in the process.

Who Can Do This: Anyone with access to the transaction whose company is subscribed to *AI Doc Review*.

Each document's *AI Doc Review* icon changes to reflect its current status — gray if no scan has been started, blue while processing, blue with a dot when results are ready, and a checkmark once all issues have been reviewed.

Go to the Transaction

- Open the transaction containing the document you scanned.

Read the Icon Status

- The *AI Doc Review* icon next to each document reflects its current status:

Not Started

A gray icon. No scan has been started.

Processing

A blue icon. The scan is in progress. Hover to confirm.

Ready to Review

A blue icon with a dot. The scan is complete. Hover to see how many *Errors*, *Warnings*, and *Checks* were found.

Reviewed

A checkmark icon. All issues have been reviewed.

Complete an AI Doc Review

Open a completed scan to see your results, work through issues, keep notes, and share them with your team.

Who Can Do This: Anyone with access to the transaction whose company is subscribed to *AI Doc Review*.

To complete a review, open the scan results, work through each issue by page, check them off as you go, save anything that needs follow-up to your notes, and share them by email or clipboard from the Summary view.

Go to the Transaction

- Open the transaction containing the document you scanned.

Open the AI Doc Review

- Click the [AI Doc Review] icon (marked with a blue dot) next to a document to open the review. The review opens to the first page with issues.

- Each finding is assigned a severity level: *Error*, *Warning*, or *Check*. Learn what each level means.

Check Issues

- Each issue shows a severity indicator, title, and description.

- Click an issue to check it off. Click again to uncheck it.

Add Issues to Notes

- If an issue needs follow-up, click the [Notebook] icon next to it to add it to your notes.

- Notes are available in the *Summary* view, where you can edit, email, or copy them.

Work Through the Document

- As you check off issues, you'll automatically move to the next page with remaining issues. A progress bar at the top tracks your overall progress.

- To move manually, click [Prev] or [Next] to jump between pages with issues, or click [Back to Summary] to jump to a specific page.

- To view pages without issues, use the document preview controls at the top.

> You can adjust the width of the review panel to see more of the document or more of the issue list.

View the Summary

- When all issues are checked, you'll be directed to the *Summary* view. You can also click [Back to Summary] at any time.

- See the status of your review, review your notes, add your own, share them with your team, and more (outlined below).

> *AI Doc Review* is a starting point, not a replacement for a thorough review. AI will not catch everything. Results should always be verified before a broker finalizes the official *Review* in the system.

View Progress

At the top, see the total issue count and how many pages they appear on. Each page is shown as a clickable number with color-coded severity indicators beneath it.

When the review is complete, all page numbers turn green and the *Summary* confirms all issues have been reviewed.

Review AI Doc Review Notes

Below the page list, view your *AI Review Notes* — each issue you saved during your review, shown with its page number, title, and description.

Add Your Own Notes

Add notes manually for anything the AI didn't flag, additional context, or other items worth capturing.

Edit Your Notes

Edit any note before sharing. Update wording, add detail, or remove what doesn't need to be included.

Share Your Notes

Next to the *AI Review Notes*, click [Send] to email your notes or [Copy] to copy them to your clipboard.

Give Feedback

Click the link: *Did AI get anything wrong?* **What could it do better?** Share your feedback to help improve future scans.

AI Doc Review FAQ

What is AI Doc Review?

AI Doc Review is an add-on feature in Paperless Pipeline that scans uploaded transaction documents for issues — then organizes the results by page and severity so your team has a structured starting point for every review.

What does AI Doc Review check for?

AI Doc Review checks for missing or incomplete fields, missing signatures, contradictory elections, placeholder values, dates out of sequence, and other common document issues. Each finding is assigned a severity level — Error, Warning, or Check — so you can focus on what matters most first.

Is my data safe with AI Doc Review?

Yes. Documents are processed by Anthropic via their API solely to generate your review results. Neither Paperless Pipeline nor Anthropic uses your document data to train, fine-tune, or improve any AI model. This is explicitly prohibited under Anthropic's API terms. Learn more about Paperless Pipeline Security.

Is my data stored by the AI?

No. API-submitted data is not retained by Anthropic beyond the time required to process your request.

Is my data shared with anyone?

No. Your data is never sold, shared with third parties, or used for any purpose beyond delivering your review results.

Who processes AI Doc Review data?

AI Doc Review is powered by Anthropic. Paperless Pipeline chose Anthropic specifically because their strict values around data privacy align with ours.