

Managing Unreviewed Docs

SUMMARY

Easily search, sort, and filter Unreviewed docs based on broker review priorities.

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Searching

- 1 Go to the Unreviewed page to search.
- 2 Click [Quick Search]. Enter all or part of the document name you'd like to view.
- 3 Click [Search Docs]. The results matching the search query will be displayed.

Sorting

- 1 Go to the Unreviewed page to sort.
- 2 Click "Sort" then select the desired option from the dropdown list.
- 3 Your list will be sorted by the sort option you selected.
- 4 Alternately, you can click a column's sort arrows to sort by that column.

Unreviewed Docs Showing all 26 docs to review							
Review and verify the following documents in accordance with your company's policies.							
Quick Search Filter Sort							
Unreviewed Doc	Transaction	Status	Location	Agents	Assigned On	Closing	Reviewed
Keybox-Authorization-By-Tenant ...	4578 East Plainsberry (Listing) ...	Listing	Bozeman		3 mins ago		☐
Notice To Prospective Buyer	673 Conclave Ave. (Listing) (Re...	Listing	Broadway Office		6 hrs ago		☐
Disclos Farm and Ranch Contract	9300 West 15th Street, St. Lou...	Listing	Downtown Office		Aug 2, 16		☐
Purchase Contract	9300 West 15th Street, St. Lou...	Listing	Downtown Office		Aug 2, 16		☐
Incomp Fully Executed Contract	9300 West 15th Street, St. Lou...	Listing	Downtown Office		Aug 2, 16		☐
Disclos Amendment to Contract	9300 West 15th Street, St. Lou...	Listing	Downtown Office		Aug 2, 16		☐
Earnes Earnest money deposit	9300 West 15th Street, St. Lou...	Listing	Downtown Office		Aug 2, 16		☐

Filtering

- 1 Go to the Unreviewed page to filter.
- 2 Click “Filter” then enter or select the the desired filter criteria. You can filter based on location, status, label, and closing dates.
- 3 Once all desired filter options have been specified, click [Filter Docs]. The docs matching the filters specified will be displayed.

Unreviewed Docs Showing 1–50 of 85 docs to review								
Review and verify the following documents in accordance with your company's policies.								
Quick Search		Filter	Sort	Previous 1 2 Next				
Unreviewed Doc Name	Transaction	Status	Location	Agents	Assigned On	Closing	Reviewed	
Seller'S Property Disclosure	111 Main Street (Listing) (Re...	Closed	Downtown Office		Jan 17, 17	Nov 02, 16		
Pre-qualification letter	111 Main Street (Listing) (Re...	Closed	Downtown Office		Jan 17, 17	Nov 02, 16		
Farm And Ranch Contract	111 Main Street (Listing) (Re...	Closed	Downtown Office		Nov 22, 16	Nov 02, 16		
Seller Financing Addendum	111 Main Street (Listing) (Re...	Closed	Downtown Office		Nov 22, 16	Nov 02, 16		
Listing agreement	111 Main Street (Listing) (Re...	Closed	Downtown Office		Oct 21, 16	Nov 02, 16		
Need signature on page 5. – Ramu T. (Oct 24, 2016)								
Sellers Property Disclosure	111 Main Street (Listing) (Re...	Closed	Downtown Office		Oct 21, 16	Nov 02, 16		
Keybox authorization by tenant 2	1234 Bluebird Lane, Dallas, ...	Closed	Downtown Office		Nov 15, 16	Nov 15, 16		
HOA	1234 Bluebird Lane, Dallas, ...	Closed	Downtown Office		Nov 15, 16	Nov 15, 16		
Keybox authorization by	1234 Bluebird Lane, Dallas, ...	Closed	Downtown Office		Nov 15, 16	Nov 15, 16		
Agreement	1234 Common Lane (Smith) ...	Closed	Downtown Office		Jan 12, 17	Jan 24, 17		

Identifying Docs Needing Review

Admins can apply Doc Labels to files needing broker review. Name the doc label appropriately (e.g, "Broker Review Needed" or "Review Needed"). Brokers can then filter by that Doc Label using the filter method above. Saving the filter (see link below) will allow the page to be accessed in the future with a single click.

Docs that don't need review can be marked as “Reviewed” by an admin or the reviewing broker (depending on your office's workflow). This removes those docs from the Unreviewed queue.

Learn how to save filters here: [Saving Custom Searches & Sorts](#) →

Learn now to define doc labels here: [Managing and Using Doc Labels](#) →

Learn how to review docs here: [Review Documents](#) →

Time Saving Doc Review Tips

This webinar covers ways to perform your doc reviews most efficiently. We'll go over tips that speed up the review process and save you time.

🕒 10:27

[View more Pipeline Pro Webinars here →](#)
