Viewing History of Reviewed Docs for Compliance

SUMMARY
Paperless Pipeline helps you stay compliant by keeping a time and date log of every document you review.

IN THIS ARTICLE

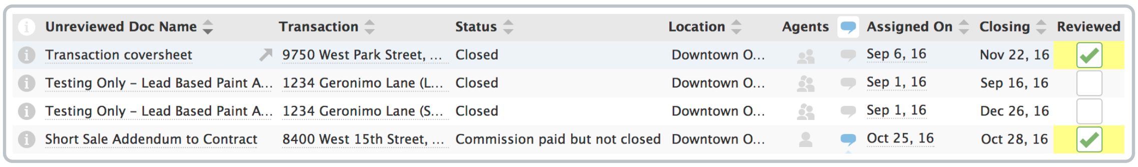
1:27

How to View History of Reviewed Docs for Compliance

To open the Unreviewed page:

1. **Click [Unreviewed] to access the Unreviewed Docs page.** This page lists all documents across all transactions that need to be reviewed. In a multi-location office, each location may be assigned a different reviewer.

2. **Click on the name of the transaction you need to review.** The transaction will open in a new popup window.
3. **Click a doc to be reviewed.** A quick preview of the document will open.
4. **Once you're ready to mark it as reviewed, click the Reviewed checkbox.** Repeat this process for the remaining docs you need to review.



Unreviewed Doc Name	Transaction	Status	Location	Agents	Assigned On	Closing	Reviewed
Transaction coversheet	9750 West Park Street, ...	Closed	Downtown O...		Sep 6, 16	Nov 22, 16	✓
Testing Only – Lead Based Paint A...	1234 Geronimo Lane (L...	Closed	Downtown O...		Sep 1, 16	Sep 16, 16	
Testing Only – Lead Based Paint A...	1234 Geronimo Lane (S...	Closed	Downtown O...		Sep 1, 16	Dec 26, 16	
Short Sale Addendum to Contract	8400 West 15th Street, ...	Commission paid but not closed	Downtown O...		Oct 25, 16	Oct 28, 16	✓

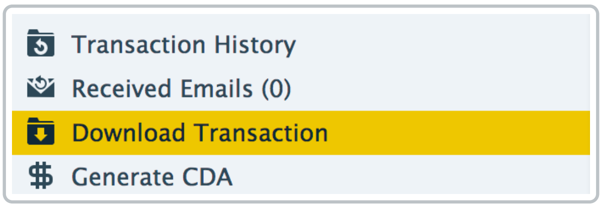
A time and date log of everything that was done in the transaction is kept in the Transaction History section. This includes broker reviews of documents.

1 **Click [Transaction History] from the left menu of a transaction then hover over the date of any action to see the date and time the action was taken.**

Download Transaction History

In case of an audit, the transaction history can be downloaded along with all documents within a transaction. This provides a complete date and time log of each document's review. To download a transaction's history:

1 **Click [Download Transaction] to start a transaction download.**



If you want to quickly see who reviewed a doc and when, go to the transaction and hover over the doc's icon. The reviewer's name and the date and time of review can be seen here.