

Doc Name Grouping FAQ

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Doc Name Grouping folds docs that share a base name into one collapsed group and shows the most recent version first. Answers to the common questions about turning it off, choosing a different primary doc, and what grouping does to your unreviewed list.

How does Pipeline decide which docs group together?

By the base name — the text before the first parenthesis. Everything after the parenthesis can differ, so *Listing Agreement (2)*, *(Signed by Seller)* and *(Final)* all sit in one group.

Which version shows up front?

The most recently added one. That way the latest version is the one you see without opening anything. To lead with a different version instead, add an asterisk to the end of that doc's name.

Can I turn grouping off?

Yes — a master admin turns it off for the whole account. Go to [Gear] → [Admin / Settings], and in Document Settings uncheck [Group documents by name on transaction Document Lists], then [Save Settings]. Docs list separately again for everyone.

Did grouping hide or delete my documents?

No — everything is still there. A group shows one doc with a count icon beside it; click the icon and the rest of the versions fan out.

Why does a transaction look fully reviewed while the doc still sits in Unreviewed?

One version inside the group hasn't been reviewed yet. A group shows the most recent doc at the group level, so if a different version is still unreviewed, the group stays in the unreviewed list. Expand the group and review the one that's left.

Do we have to name docs a certain way for this to work?

No setup, no naming rules. System versions like (2), structured names like *(Signed by Seller)*, and looser ones like *(10/21)* or *(Jim)* all group the same way. Standardized Document Names make it more predictable if you want that consistency.

How do I keep one doc out of a group?

Change the part of its name before the parenthesis. Once the base name differs, the doc lists on its own.

Learn More

Docs that share a base name fold into a single group on the transaction, with the newest version up front and every other version tucked behind it.

See [Doc Name Grouping](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
