

Doc Name Grouping

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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.

Introduction

The same form tends to come back three times: a draft, a version signed by the seller, a final. That's how a transaction's doc list turns into a scroll. Doc Name Grouping folds those versions together into one row.

What you see is the most recent version, with a count telling you how many are behind it. Click the count and the rest fan out.

Nothing is deleted and nothing is hidden from anyone who could see it before. Grouping is only about how Pipeline draws the list, and it works with no setup and no strict naming rules.

How It Works

Pipeline reads the doc name, groups by what comes before the parenthesis, and shows the newest one up front.

Docs Group by Base Name

Docs group when they share a base name, which is the text before the first parenthesis. Whatever follows can vary freely, so all four of these belong to one group:

- Listing Agreement
- Listing Agreement (2)
- Listing Agreement (Signed by Seller)
- Listing Agreement (Final)

The Newest Version Leads the Group

Each group shows one doc up front — the primary — with a count beside the name telling you how many are inside. The most recently added doc is the primary by default, so the latest version is the one you see.

No Naming Rules to Follow

Grouping works with system versions like *Listing Agreement (2)*, structured names like *Listing Agreement (Signed by Seller)*, and looser ones like *Listing Agreement (10/21)* or *Listing Agreement (Jim)*. Pipeline eSign workflows stay organized the same way.

Sort the List by Name

Grouping reads best when you sort the doc list by document name.

Turn It Off

Grouping is on for the whole account, and a master admin can switch it off. With it off, every version shows on its own row again.

Expand or Collapse a Doc Group

Open a group to see every version at once, then close it again to get your short list back.

Who Can Do This: Anyone who can see the transaction's docs.

To expand or collapse a doc group:

1. Open the transaction.
2. In the Docs section, look for a group — it's the doc with a count icon beside its name.
3. Click the group icon to expand it and see every doc inside.
4. Click the group icon again to collapse it back to the primary doc.

Expanding changes nothing about the docs themselves. It's a view, and it's yours to open and close as you work.

Manually Set the Primary Doc

Choose which version of a doc leads the group when the newest one isn't the one you want up front.

Who Can Do This: Admins, on any transaction. Agents, only on docs they uploaded that an admin hasn't marked as Reviewed.

To manually set the primary doc:

1. Open the transaction.
2. Click the doc's [Gear], then [Edit Doc].
3. Add an asterisk to the very end of the doc name — for example, Listing Agreement (Signed by Seller)* .
4. Click [Save].

That doc now leads its group instead of the most recent one. If more than one doc in a group ends with an asterisk, the most recently added of those is the one you see.

Ungroup a Doc

Pull one doc out of a group so it stands on its own row.

Who Can Do This: Admins, on any transaction. Agents, only on docs they uploaded that an admin hasn't marked as Reviewed.

To ungroup a doc:

1. Open the transaction.
2. Click the doc's [Gear], then [Edit Doc].
3. Change the part of the doc name *before* the parenthesis so it differs from the others in the group.
4. Click [Save].

The doc no longer matches the group's base name, so it lists on its own.

Turn Doc Name Grouping On or Off

Grouping is an account-wide setting. Turn it off and every doc lists separately for everyone.

Who Can Do This: Master admins.

To turn doc name grouping on or off:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. In the Document Settings section, check or uncheck [Group documents by name on transaction Document Lists].

3. Click [Save Settings].

The change applies to everyone on the account. Turn it off and docs that had been folded together appear on their own rows again, exactly as they were.

Standardize How Your Docs Group

Grouping follows the names your team types, so consistent names make it more predictable. Two approaches work: keep one base name (*Listing Agreement*) and let people add the detail in parentheses, or create a standard name per variation (*Listing Agreement (draft)*, *Listing Agreement (final)*) and have the team pick the right one.

Build a shared list of your company's document names, and every agent names the same form the same way — with your preferred label and permission category already attached.

See [Standardized Document Names](#)

Doc Name Grouping FAQ

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. See [Doc Name Grouping FAQ](#).

Doc Name Grouping Troubleshooting

Running into a problem? Start here.

- [Why Are My Documents Grouped Together on a Transaction?](#)
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