

Why Are My Documents Grouped Together on a Transaction?

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Docs that share a base name collapse into one row, which can look like documents went missing or a reviewed doc came back. Here's what's happening, and how to change it.

Docs With the Same Base Name Collapse Into One Row

This is Doc Name Grouping. Pipeline folds docs that share a base name — the text before the first parenthesis — into a single group, and shows the most recently added one at the front. The rest are behind it, not gone.

To see them:

1. Open the transaction and scroll to the Docs section.
2. Find the doc with a count icon beside its name — that's the group.
3. Click the icon to expand it.

Click the icon again to collapse the group back down.

A Group Still Shows as Unreviewed After You Reviewed the Doc

A group is only as reviewed as the docs inside it. Because a group shows the most recent version at the group level, reviewing that one leaves any older unreviewed version in place — and the group keeps appearing in your unreviewed list.

Expand the group and review the version that's still outstanding, or review it directly from the Unreviewed page.

You Want Every Doc Listed Separately Again

Grouping is an account-wide setting, and a master admin can switch it off. Docs that were folded together come back onto their own rows, exactly as they were before.

To turn grouping off:

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

This changes the view for everyone on the account, not just for you.

One Doc Keeps Joining a Group It Shouldn't

Grouping goes by the name, so a doc joins whatever group its base name matches. Rename the part *before* the parenthesis and it lists on its own — click the doc's [Gear], choose [Edit Doc], change the name, and save.

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.
