Clear a Backlog of Unreviewed Documents

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Thousands of old docs sitting unreviewed, and no way to clear them a page at a time. Send us one rule and our Tech Team clears the backlog for you, at no charge.

Introduction

Every doc assigned to a transaction lands on the Unreviewed page and stays there until an admin signs off. That works beautifully going forward and badly backwards: an office that switched on the habit late, or inherited an account, or came through a franchise change, can be looking at years of closed files nobody is ever going to review one by one.

There's no self-serve bulk review, so the honest answer is that this one comes to us. What you supply is a rule: a boundary that says which docs are safely historical. Our Tech Team applies it in a single pass. We've done this at 18,000 docs and more, where the backlog had grown big enough to slow the account down.

Then the part that keeps it from coming back: change where reviewing happens in your day. A backlog is almost always a habit problem wearing a data problem's clothes.

When to Use This

- Your Unreviewed page runs to thousands of docs and most of them are on closed files.
- Pipeline feels slow, and the unreviewed count is the biggest number in your account.
- You took over an account, or came through a franchise or brokerage change, and inherited someone else's queue.
- You started marking docs reviewed partway through and everything before that date is still sitting there.
- You're about to switch on a second sign-off step and don't want to inherit the whole history with it.

1. Decide the Rule

We clear by rule, not by selection, so the work on your side is deciding where history ends. One rule is enough, and it's usually one of these — or the two combined:

- **A date.** Every doc assigned before 1/1/2020.
- **A transaction status.** Every doc on transactions that are Closed, Fell Through, Expired, or Withdrawn.
- **Both.** Docs on transactions that closed, fell through or expired before a given date — the most common request, and the safest, because a live deal can't be caught by it.

Be deliberate here. Marking a doc reviewed records that an admin signed off on it, so the rule you send is a statement about what your brokerage considers already reviewed. Draw the line where that's true.

2. Send Us the Request

The request has to come from a master admin, from the email address on the account — that's the authorization, and it's why we can't take it from anybody else. Include the rule in one sentence and nothing else is needed.

We'll confirm the count before anything runs, so you see how many docs the rule catches and can widen or narrow it before we go. There's no charge for a bulk review.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help

3. Change the Habit That Built the Backlog

A cleared queue refills at exactly the rate you were filling it before. The fix is to move review to the moment of assignment rather than a task you'll do later: when an admin files a doc onto a transaction, they check Reviewed in the same breath if it needs nothing further.

You sign off on a doc by checking **Reviewed** — that clears it from the queue, locks it against edits, and records who reviewed it and when.

See Doc Review

> Reviewing at assignment isn't a shortcut around review — it's the same decision, made when the document is already open in front of you, instead of a week later on a list of four hundred.

4. Work What's Left in Slices

Whatever survives the rule is your real queue: current docs that genuinely need somebody's eyes. Filter it down to one reviewer's share, one office, or one transaction status, and work that instead of the whole pile.

The *Unreviewed* page carries its own search, filters, and sortable columns, so a list hundreds of docs long becomes the handful you want to work first.

See Unreviewed Docs Search