Doc Review

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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.

Introduction

Somebody has to be the one who looked. In most offices that's the broker or the coordinator working through a file before it closes, checking that each document is the right form, filled in properly, and complete.

Reviewing is how that pass gets recorded. Checking the **Reviewed** box beside a document is a sign-off rather than a status change, closer to initialing a page than to filing it, which is why it stays a deliberate act on one document at a time and never ticks itself. It also settles the document, so the version that got signed off is the version that stays and nobody edits the file out from under the person who approved it. Every check carries a name and a date, which is what an auditor is really asking for when they ask how a file was handled.

Not every office reviews, and nothing breaks if yours doesn't. Where it's in use, the office has one running list of what still needs a look and a permanent record of what got one. And if you've inherited an account with years of documents sitting unreviewed, that isn't a backlog you have to click through one at a time. Send us the rule for what counts as historical and our team clears it in a single pass.

How It Works

One checkbox, on every doc, in two places.

Where the Checkbox Lives

Look for **Reviewed** to the right of each doc in a transaction's doc list, and on the *Unreviewed* page beside every doc waiting on you.

Who Can Review

Reviewing takes the **Review docs** admin-level permission, granted per location on a user's profile in *Manage Users*. It can go to someone who isn't a master admin — an operations manager or a transaction coordinator, for one location only. Pair it with **View All Transactions** if they need to review docs on transactions they haven't been added to.

What Review Locks

Marking a doc **Reviewed** is the lock on that doc. Up to that point, agents can manage docs they uploaded themselves — rename, merge, break apart, relabel, comment, delete. Once it's reviewed, that stops: only master admins and admins with **Delete any docs in this location** can delete it, and a reviewed doc can't be reassigned to a different transaction until an admin unassigns it first.

Docs That Come Back Unreviewed

When you break a doc apart, Pipeline always marks the new docs unreviewed, even if the original was signed off. Offices that require a fresh look at the split-out pages get one automatically.

Every Review Leaves a Name and a Date

Pipeline logs every review. Hover the information icon to the left of a doc's name to see who marked it reviewed and when, and open *Transaction History* from the left menu for the full history on any doc in the file.

Offices That Don't Review

The review step is a company setting, not a requirement. A master admin can turn **Enable Reviewed Docs functionality** off under Feature Settings, and the checkbox and the [Unreviewed] tab both disappear for everyone.

Mark a Doc Reviewed

> Sign off on a doc from the transaction it belongs to.

> **Who Can Do This**: Admins with the **Review docs** permission for that location.

To mark a doc as reviewed:

1. Open the transaction and find the doc in its doc list.
2. Click the doc's name to read it, and check that it's complete and accurate.
3. Check [Reviewed] to the right of the doc.

The doc drops off the *Unreviewed* page, and Pipeline records your name and the date against it.

Review a Doc From the Unreviewed Queue

> Work straight down the queue, checking each doc against its transaction as you go.

> **Who Can Do This**: Admins with the **Review docs** permission for that location.

To review a doc from the unreviewed queue:

1. Click [Unreviewed] at the top of Pipeline.
2. Click the doc's name to preview it. While a preview is open, Shift + Up-arrow and Shift + Down-arrow move you to the previous or next doc.

3. Click the transaction's name to open the transaction in a new window, so you can read the doc and the file side by side.

4. Check [Reviewed] beside the doc.

The doc leaves the queue on your next page refresh, and the next doc is waiting.

Undo a Doc's Reviewed Mark

> Uncheck the box to put a doc back in the queue — useful when a doc was signed off early or needs replacing.

> **Who Can Do This**: Admins with the **Review docs** permission for that location.

To undo a doc's reviewed mark:

1. Open the transaction and find the doc in its doc list.

2. Uncheck [Reviewed] to the right of the doc.

3. Refresh the page.

The doc returns to the *Unreviewed* queue, and the doc's gear menu picks up the options that the review had locked.

See Who Reviewed a Doc

> Check the name and date behind any sign-off.

> **Who Can Do This**: Anyone who can see the transaction and the doc.

To see who reviewed a doc:

1. Open the transaction and find the doc in its doc list.

2. Hover the information icon to the left of the doc's name.

The hover shows who marked the doc reviewed and when. For the full history on the file, open*Transaction History* from the transaction's left menu.

Show an Auditor How a File Was Handled

Hovering the information icon answers one question about one doc. An audit asks a wider one: everything that happened on the file, in order, including the sign-offs that were later undone.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

Doc Review FAQ

Checking **Reviewed** signs a doc off, clears it from the queue, and locks it against changes. Answers to the common questions about who can review, undoing a review, and reviewing in bulk.

See Doc Review FAQ