Entered Docs

Last Modified on 09/04/2026 11:08 am EDT

Already keying closed files into QuickBooks, Lone Wolf, or another outside system? Turn on *Entered Docs* and every doc gets a second checkbox so you can track what's made it across.

Introduction

The bookkeeping happens somewhere else. Once a deal wraps, somebody keys the paperwork into an accounting package, and the only record of which documents have made that trip tends to be a spreadsheet kept alongside, or memory.

Entered Docs is a checkbox for exactly that. Switch the feature on and every document in every transaction picks up an **Entered** box beside **Reviewed**, with its own page listing what hasn't made the trip yet. The two boxes answer different questions on purpose. Reviewed says a staff member checked the document for accuracy and completeness. Entered says the document has landed in QuickBooks, Lone Wolf, or whatever system your office keeps outside Pipeline.

You get a second, independent status with nothing else wired to it, which is why offices bend it to other jobs. A second sign-off is the common one: the coordinator reviews, then the broker confirms. One thing worth knowing before you hand the page to anyone is that turning the feature on starts from the beginning of your account rather than from today, so a long history arrives unentered all at once, and it's better to clear it first.

How It Works

One company setting, one permission, one extra checkbox, and a view for finding what's left.

Only a Master Admin Turns It On

The **Enable Entered Docs Feature** setting lives under Feature Settings in *Admin / Settings*, and only a master admin can change it. Until it's on, no one sees an **Entered** checkbox anywhere.

Who Can Mark Docs Entered

Marking docs entered takes its own admin-level permission, **Mark docs as entered**, granted on a user's profile. It's separate from **Review docs** — a user can have one, both, or neither.

Find What's Left

The **Unentered Docs** view sits at the top of the left menu on the *Unreviewed* page. It's the entered-side equivalent of the review queue: everything still waiting to be keyed in. A doc that's already been marked **Reviewed** disappears from the *Unreviewed* list but keeps showing under **Unentered Docs** until someone checks **Entered**.

An Entered Mark Locks the Doc

An **Entered** mark locks a doc the same way a review does. Agents can't delete docs marked entered, and a merge set to delete its source docs skips any doc that's been marked entered or reviewed.

Turn It On Mid-Stream

Switch the feature on in an established account and every historical doc shows as unentered, which can be thousands of them. There's no in-product way to clear that in bulk, but we can. Send us the rule — docs assigned before a date, or docs on closed transactions — and our tech team marks them entered in one pass.

Turn On Entered Docs

> Add the **Entered** checkbox to every doc in the account.

> **Who Can Do This**: Master admins.

To turn on entered docs:

1. Click [Gear] in the upper-right corner, then [Admin / Settings].

2. Scroll to Feature Settings and check [Enable Entered Docs Feature].

3. Click [Save Settings].

An **Entered** checkbox now shows on docs for admins who have the permission to use it.

Turn Off Entered Docs

> Drop back to a single review step, with only the **Reviewed** checkbox on docs.

> **Who Can Do This**: Master admins.

To turn off entered docs:

1. Click [Gear] in the upper-right corner, then [Admin / Settings].

2. Scroll to Feature Settings and uncheck [Enable Entered Docs Feature].

3. Click [Save Settings].

The **Entered** checkbox comes off your doc lists, and the **Unentered Docs** view goes with it.

Mark a Doc Entered

> Record that a doc has been keyed into your accounting or management system.

> **Who Can Do This**: Admins with the **Mark docs as entered** permission.

To mark a doc as entered:

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

2. Check [Entered] beside the doc.

The doc drops off the **Unentered Docs** view.

Find Docs That Haven't Been Entered

> Pull up everything across the office that still needs keying in.

> **Who Can Do This**: Admins with the **Mark docs as entered** permission.

To find docs that haven't been entered:

1. Click [Unreviewed] at the top of Pipeline.

2. Click [Unentered Docs] at the top of the left menu.

You get every doc still waiting to be entered, and you can preview and mark each one from there.

Entered Docs FAQ

Entered Docs adds a second checkbox to every doc so you can track what's been keyed into an outside system. Answers to the common questions about turning the feature on, who can mark docs entered, and clearing an old backlog.

See Entered Docs FAQ