

Get the Unreviewed Page Down to What Actually Needs You

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Every unreviewed document shows on the Unreviewed page — all of them, always. Labels and a saved filter are how a broker gets down to the handful that are actually theirs.

Introduction

The Unreviewed page is honest to a fault: if a document is assigned and not yet signed off, it's on the list. There's no routing, no per-reviewer queue, and no way to suppress anything from it. For a broker who only needs to see contracts, that's several hundred rows of things that aren't contracts.

The way through isn't to hide anything; it's to mark what matters so you can narrow the page. A label per reviewer, or per review-need, turns one shared pile into as many filtered views as you have people.

The second half matters as much as the first: documents that genuinely don't need review still have to be checked off, or the page never empties. Doing that with a label on them leaves an auditor a record that the pass was deliberate rather than careless.

When to Use This

- Your broker only needs to review a small subset and is scrolling past everything else.
- Different people — admin, broker, accountant — each need to review different document types.
- You're looking for a way to keep certain documents off the Unreviewed page.
- Documents on closed or fell-through transactions are still sitting in the queue.
- You want to clear items without implying somebody reviewed them.

1. Accept That You Can't Suppress Anything

Every unreviewed document appears, regardless of the transaction's status. A deal that fell through in March still has its documents on the page, and there's no setting that changes that.

Which means a document leaves the page only two ways: somebody marks it reviewed, or somebody deletes it. Every approach below is really about deciding, deliberately, which of those applies — and about not making one person read the whole list to find out.

2. Name a Label per Reviewer or per Review Need

Decide how your office actually divides the work and name labels to match it. Either shape works, and offices use both:

- **Per reviewer** — *DB Review, Accounting, TC*. Each person has a color that means "this one is yours."
- **Per need** — *Ready for Review, No Review Needed*. Anyone can apply them, and the page divides into work

and not-work.

Whoever assigns the document is usually the right person to apply the label, because they've just read it.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See [Doc Labels](#)

3. Filter and Sort the Page by That Label

With labels applied, the Unreviewed page becomes as many lists as you have labels. Filter to one and everything else drops away; sort by label and the groups line up in order.

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](#)

4. Save the View as a Shortcut

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See [Custom Shortcuts](#)

5. Close Out What Doesn't Need Review

Documents that need no review still have to be checked off to leave the page. Label them *No Review Needed* first, then check them off — so the record shows a deliberate decision rather than a bulk clearance, and anyone auditing later can see which documents were passed on purpose and why.

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](#)
