Send a Document Back to the Agent for a Fix

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A signature is missing and the doc has to go back. There's no reject button — a comment does the work, and it emails the agent for you.

Introduction

Reviewing paperwork means sending some of it back. An initial is missing, a date is wrong, page four is a scan of the wrong form. What you want is a way to say so that reaches the agent, stays attached to the document, and is still there when the corrected version arrives.

Pipeline has no reject action, and deleting the doc is the wrong move: you'd lose the record that it was submitted at all, and the agent gets no explanation. What you use instead is a doc comment, which does the notifying for you, plus a label so the doc reads as rejected from across the room.

The last piece is restraint: leave the doc unreviewed and the task open. Those two states are what keep the item on your worklist until it's genuinely resolved.

When to Use This

- A document is missing a signature, an initial, or a date and the agent needs to fix it.
- You're looking for a reject button on the Unreviewed page.
- An agent filed a doc under the wrong permission category or with the wrong name.
- You want to remember what was wrong with a document when its replacement lands next week.
- You need someone besides the agent — a TC, the broker, the other admin — to see the correction request.

Why This Beats Deleting and Asking Again

Deleting the bad version feels tidy and costs you the audit trail: nothing then shows that the agent submitted anything, when they submitted it, or what was wrong with it. If the correction never arrives, there's no evidence of the ask either.

A comment leaves the submission where it is and adds the correction to it. Six weeks later, when the file is being audited or the agent says they were never told, the whole exchange is sitting on the document.

1. Leave the Correction on the Doc Itself

Write what's missing, not that something is missing. *Missing legal description on page 2* tells the agent what to do; *needs correction* starts an email thread. The comment stays with the document and shows to everyone who can see it.

Leave a note right on a doc and it travels with the document — your team sees it, the agent hears about it, and *Transaction History* keeps the record.

See [Doc Comments]

2. Make Sure the Agent Actually Gets It

The comment only reaches the agent if your account is sending them. With that setting on, the assigned agent and the person who uploaded the doc are both emailed automatically — with your comment text, the doc's name, and a link that opens the document itself.

An admin leaves a comment on a doc, and Pipeline emails it to the agent with a link straight to the document.

See [Doc Comment Notifications]

> Agents can reply to that email to reach you directly, or follow the link into the transaction and answer with a note. Either way the conversation stays attached to the deal rather than disappearing into your inbox.

3. Flag It So It's Visible at a Glance

A comment is a small blue bubble. When you're looking down a long Unreviewed page, you want the rejected docs to be obvious — so give them a color. A red label named *REJECTED* or *Needs Signature* shows on the doc everywhere it appears, and you can sort or filter by 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]

4. Leave It Unreviewed and the Task Open

Resist the urge to tidy. An unreviewed doc is a doc still on somebody's list, which is exactly what you want a rejected document to be — marking it reviewed would clear it from the queue and lock it against changes.

If the agent already checked the matching checklist task, remove that check. It puts the task back in front of them as outstanding work, and it stops the transaction reading as further along than it is.

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]

5. Loop In Anyone Else Who Needs to Know

Sometimes the correction has to reach more than the agent — a transaction coordinator, the managing broker, the other admin covering that office. Drag the doc comment into the body of a note or email on the transaction and it carries across whole: the doc name, the comment, who wrote it, and when.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email