Turn On a Second Sign-Off for Documents

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

One checkbox isn't enough when two different people have to sign off. Entered Docs adds a second one — and its own page of what's still outstanding.

Introduction

Reviewed answers one question: has an admin signed off on this document? Plenty of offices need a second, independent answer alongside it. Has this been keyed into QuickBooks or Lone Wolf? Has the broker looked at it, after the coordinator did? Has accounting seen the commission check?

Entered Docs is that second checkbox. It was built for the accounting handoff, hence the name and the Unentered page listing everything not yet keyed across. But offices use it just as often as a plain second reviewer step, and it works the same either way.

There's one sequencing trap, and it's the reason this is a workflow rather than a setting. Switching the feature on doesn't start from today; it starts from the beginning of your account. Deal with that first and the rest is five minutes.

When to Use This

- Your admin reviews documents and your broker or accountant needs to sign off separately.
- You key closed files into QuickBooks, Lone Wolf, or another accounting system and want to track what's made it across.
- You need a second checkbox and you're trying to make Reviewed do two jobs.
- You turned the feature on and inherited thousands of unentered documents.
- Pipeline slowed down after you enabled it.

1. Clear the History Before You Switch It On

There's no start date on this feature. The moment it's on, every document in your account's history counts as unentered — and for an established office that's a five-figure backlog on the Unentered page, arriving all at once.

So do this in the other order. Before enabling, email us with a rule for what should count as already entered — a cutoff date, or transaction statuses like Closed, Fell Through, Expired and Withdrawn, or both — and our Tech Team marks that history as entered in one pass. Then turn the feature on and it starts clean.

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

> Skipping this is the mistake, not a shortcut. A large unentered backlog is one of the few things that visibly slows an account down, and clearing it afterwards is the same request you could have made beforehand —

with the interim spent on a page nobody can use.

2. Turn On the Feature

Enabling adds the second checkbox to every document and puts the Unentered page in your menu. It's an account-wide switch, and only a master admin can throw it.

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.

See Entered Docs

3. Give the Right People the Permission

Marking documents as entered is an admin-level permission, because the page it opens shows documents across the whole account rather than just a person's own. Grant it to the people doing the second sign-off — your bookkeeper, your broker, whoever the second pair of eyes is — and to nobody else.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

4. Mark What Needs Entering and Work It

Not every document needs the second pass. A label — *Needs Entering*, or the reviewer's own initials — tells the person doing it which documents are theirs, and turns the queue into a filtered list rather than everything in the account.

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

> Save the filtered view once and it's a click from then on, which is what makes a two-checkbox process survive contact with a busy month.