

Unreviewed Docs List

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

Every doc assigned to a transaction lands on the *Unreviewed* list and stays there until an admin signs off on it — one running worklist of what's outstanding across your whole office.

Introduction

Compliance is a question about what's outstanding, not about what's finished. The Unreviewed list is that question standing in one place: every document assigned to a transaction that nobody has signed off on yet.

A doc arrives on the list the moment it's assigned and stays until someone checks it and marks it Reviewed. Nothing else takes it off. The list pulls from every transaction you can see, so instead of opening files one at a time to work out what's new, you get one running worklist covering the whole office. It's honest to a fault about that, which is the point of it. If a document is waiting, it's here.

A morning's compliance work starts and ends in one place, and every sign-off leaves a name and a date behind it. And if your list runs to thousands, that's a very ordinary place to be starting from rather than a sign something has gone wrong. Offices switch reviewing on late, inherit accounts, come through franchise changes. A backlog that size doesn't have to be cleared a row at a time, and it's worth clearing, because a long one slows the account down.

How It Works

How a Doc Gets on the List

Automatically. A doc appears the moment it's assigned to a transaction with its **Reviewed** box unchecked — there's nothing to add and nothing to queue by hand. Docs sitting in *Unassigned Docs* join the list once they're assigned.

How a Doc Comes Off

Only by being marked **Reviewed**. Status doesn't clear anything: docs on Closed, Fell Through, and Auto Expiry transactions all still show here and still count toward your total.

What You Can Do From the List

Preview a doc, open its transaction beside it, download the original, or mark it reviewed. Deleting happens on the transaction itself. Every review and unreview is written to that transaction's *Transaction History*, which is where to look for who cleared something and when. When your office uses *Entered Docs*, a doc marked **Reviewed** drops off this list and waits under **Unentered Docs** in the left menu until someone marks it entered.

View the Unreviewed Docs List

See every doc across your office that's still waiting on an admin's sign-off, in one place.

Who Can Do This: Admins with the **Review docs** permission.

To view the unreviewed docs list:

1. Click [Unreviewed] at the top of Pipeline.
2. Click a doc's view arrow to read it without leaving the list.

The doc opens in its own window, so the list stays where it was and you keep your place.

Open a Doc's Transaction From the List

Put the transaction beside the doc so you can check one against the other before you sign off.

Who Can Do This: Admins with the **Review docs** permission.

To open a doc's transaction from the list:

1. Click [Unreviewed] at the top of Pipeline.
2. Click the transaction name next to the doc.

The transaction opens in a new window, leaving the list open behind it so you can work the two side by side.

Download a Doc From the List

Pull the original file down without opening the transaction it belongs to.

Who Can Do This: Admins with the **Review docs** permission.

To download a doc from the list:

1. Click [Unreviewed] at the top of Pipeline.
2. Click [Gear] to the right of the document name.

3. Click [Download].

The original file downloads as it was uploaded. The doc stays on the list — downloading isn't reviewing.

Unreviewed Docs List FAQ

The *Unreviewed* page holds every doc waiting on an admin's sign-off, and a doc leaves it only when someone checks **Reviewed**. Answers to the common questions about who can see the list, what stays on it, clearing a backlog, and where the old doc counts went.

See [Unreviewed Docs List FAQ](#)

Unreviewed Docs List Troubleshooting

List not behaving? Start here.

- [Why Doesn't My Unreviewed Queue Look Right?](#)