Unreviewed Docs List

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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.

Frequently Asked Questions

Who can see the Unreviewed page?

Admins with the Review docs permission. Without it the tab doesn't appear at all, which is why agents never see the page. If an admin also needs docs from transactions they aren't on, they'll need **View All Transactions** for that location too.

How does a doc leave the list?

Only by being marked Reviewed. Docs don't drop off on their own when a transaction closes or changes status — someone has to check the box and save it.

Do docs on closed transactions still show up?

Yes. Docs uploaded to Closed, Fell Through, and Auto Expiry transactions still appear on the list and still count toward your unreviewed total. Status doesn't clear anything; review does.

Can I mark a whole batch of docs reviewed at once?

Not from inside Pipeline. Review is document-by-document by design. For a real backlog, email us the rule you want applied — every doc assigned before a date, or every doc on a closed transaction — and our tech team can bulk-mark them for you.

Can I delete a doc straight from the Unreviewed page?

No. Click the transaction name next to the doc to open the transaction, then delete the doc there.

Can I download a doc without opening its transaction?

Yes. Click [Gear] to the right of the document name, then [Download]. That works the same way in *Unassigned Docs* and on the *Reference* page.