Unreviewed Docs Search

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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.

Introduction

A broker who only reviews contracts opens a page holding several hundred documents that mostly aren't contracts. The list is doing its job. It just isn't yet doing yours.

Three controls cut it down to the part you're responsible for. Search finds one document by name, which is the quick route when you know what you're after. Filters narrow the page to a slice of the office. Sorting puts what's left in the order you actually work it, oldest first if that's how you clear a queue. None of it changes the list itself, only which part of it is in front of you right now.

The payoff is a page showing the handful genuinely waiting on you rather than everything waiting on everybody. It's also worth knowing that an empty page isn't always a failed search. Sometimes it means there's nothing left to review, which after a long morning is easy to mistake for something being broken.

How It Works

Which Search Box Finds Docs

The one on the *Unreviewed* page. It matches all or part of a document name, so "addend" finds every addendum. The search at the top of Pipeline is a different tool — that one looks for transactions.

Cutting the Page Down

Filters narrow the page to a slice of the office; sorting puts what's left in the order you work it, oldest first if that's how you clear a queue.

Control	What it takes
[Filter]	Location, transaction status, doc label, and closing date.
[Sort] and the column arrows	Any column on the page. Close Date is the only date column it carries.

They Stack, and They're Views

Search, filter, and sort are separate controls on the same page and they combine. None of them change the list or the docs on it — they only change which part of it is in front of you right now.

Search the Unreviewed Docs List

Find a doc by name without scrolling the full list.

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

To search the unreviewed docs list:

1. Click [Unreviewed] at the top of Pipeline.
2. Click [Quick Search].
3. Enter all or part of the document name.
4. Click [Search Docs].

The list narrows to the docs matching your search.

Sort the Unreviewed Docs List

Put the list in the order you want to work it — oldest first, by transaction, by close date.

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

To sort the unreviewed docs list:

1. Click [Unreviewed] at the top of Pipeline.
2. Click [Sort], then choose an option from the dropdown. You can also click a column's sort arrows to sort by that column.

The list reorders on the option you picked and holds that order while you work. It resets to the default the next time you open the page.

Filter the Unreviewed Docs List

Cut the list down to one location, one status, or one label before you start reviewing.

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

To filter the unreviewed docs list:

1. Click [Unreviewed] at the top of Pipeline.
2. Click [Filter].
3. Enter or select your criteria. You can filter by location, transaction status, doc label, and closing date.
4. Click [Filter Docs].

Only the docs matching your filter show. If it's a view you'll come back to, save it as a shortcut and it reopens with one click.

Filter by Something the Page Doesn't Offer

No agent filter, no side filter, no way to ask for the docs nobody has tagged. The way round all three is to put your

own mark on the documents first, then filter on that.

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

Keep the View You Just Built

Nothing on this page survives your leaving it. The location filter, the label filter, the oldest-first sort: all of it resets, so a broker who only ever reviews contracts sets the same three controls again every visit.

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

Frequently Asked Questions

Why does searching for a document name return nothing when I know the docs are there?

You're probably searching in the wrong box. The search at the top of Pipeline looks for transactions. The *Unreviewed* page has its own search tab — use that one and partial document names match.

The page says no docs match my search criteria, but I didn't search. What does that mean?

It means nothing is waiting for review. The message mentions a search even when you haven't run one. If you've just worked the list down, that's the finish line.

Can I save a filtered version of the list?

Yes. Set the search, filter, and sort the way you want them, then save that view as a shortcut. It reopens with the same view in one click from your *Custom Shortcuts* menu.

Can I set a default sort order so the page always opens the way I want?

No. There's no persistent sort preference — every visit starts on the default order. Set the sort you want once, save it as a shortcut, and open the page from there instead.

Can I filter to show only docs with no label?

No. There's no "no label" filter on the *Unreviewed* or **Unentered Docs** views. You can filter by a specific label, but not by the absence of one.

Can I sort or filter the list by agent?

No. More than one agent can be on a transaction, so there's no single agent to sort by. Offices that need this use a doc label per agent or team and filter on the label instead.