Doc Deletion

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Take a document off a transaction or out of Unassigned Docs from its own menu. It moves to Deleted Docs and waits there for a year, so a wrong click costs you a download rather than the file.

Introduction

A duplicate went up twice, an agent filed the wrong contract, or a deal died and its paperwork is still sitting on the file. Deleting is how each of those comes off.

What happens next is the part worth knowing before you click. Pipeline holds the document rather than erasing it, along with the name of whoever removed it and the date, and it keeps all of that for a year. Inside that year you can bring the file back yourself. Two things end it early: the year running out, and a master admin clearing Deleted Docs by hand. After either, the document is gone for everyone, including our team.

So delete freely inside the year, and download anything you would want back before that year is up.

How It Works

When Delete Is on the Menu

You manage the documents you added, and Delete sits in the gear menu beside each of them. That holds until an admin assigns the document to a transaction or marks it Reviewed, and from that point the document is an admin's to remove. An admin holding **Delete any docs in this location** can delete any document in that location, reviewed ones included.

Unassigned Deletes in Batches, a Transaction Deletes One at a Time

The Unassigned Docs page carries a bulk action, so a queue full of misfires clears in one pass. On a transaction, documents come off individually by design, each from its own menu. Where a whole deal's paperwork needs to stop traveling, moving it between permission categories does that job without deleting anything.

How Far the Deletion Reaches

Deleting a document takes it off the transaction and out of everyone's document list. What it doesn't do is switch off a download link you have already sent. To have a link that's already out there disabled, email **help@paperlesspipeline.com** with the transaction and the document name and our team disables it. Reference docs work differently: a deleted one leaves no copy behind, so keep the original file.

Delete a Document From a Transaction

> Take one document off a transaction. It moves to that transaction's Deleted Docs page, where it stays for a year.

Who Can Do This: Anyone for the documents they added, until an admin assigns the document or marks it Reviewed. After that, an admin with Delete any docs in this location.

To delete a document from a transaction:

1. Open the transaction and scroll down to its documents.
2. Click the [Gear] to the right of the document.
3. Click [Delete].

The document leaves the transaction's document list and appears on the transaction's Deleted Docs page with your name and the date against it. No [Delete] in the menu means the document is Reviewed, or somebody else's; ask an admin to remove it.

Delete Several Documents From Unassigned Docs

Clear a batch of misfires out of the queue in one pass, which is the fastest way to tidy up after a scanner or a wrong forward.

Who Can Do This: Anyone for the documents they added, while those documents are still unassigned. An admin with Delete any docs in this location can remove anyone's.

To delete several documents from Unassigned Docs:

1. Click [Unassigned] from the top menu.
2. Check the box beside each document you want to remove.
3. Click [Bulk], then [Bulk Delete].

Everything you checked moves to the Deleted Docs page in Unassigned Docs, listed with your name and the date, and available there for a year.

Check What's Been Removed and by Whom

Every deletion leaves a row naming the person and the day, which is what settles the question of where a document went when two people remember it differently.

Delete a doc and it doesn't vanish. It lands in *Deleted Docs*, where it stays for a year with a record of who removed it and when.

See Deleted Docs

Put a Document Back

Deleted the wrong one? Recovery is yours to do, and it works the same whether the document was on a transaction or waiting in the queue.

Download a deleted doc back out of *Deleted Docs*, then upload it again — that's the whole recovery, and you can do it without emailing us.

See Doc Recovery

Clear a Fallen-Through Deal Without Deleting Its Paperwork

When a contract collapses and the listing goes out again, the dead buyer's documents don't have to be removed one by one. Sorting them by permission category on the original transaction keeps them off the next one.

A New Offer copies almost everything. The permission category on each document is what decides the exceptions — and it works in both directions.

See Control What Carries Over to a New Offer

Doc Deletion Troubleshooting

A document that should be on a transaction and isn't wasn't always deleted. Start here.

- Missing Documents on a Transaction