Doc Preview

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Click a doc's name and it opens right there on the page — read it, page through it, and keep working without downloading a thing.

Introduction

Most of the time you don't need the file, you need to look at it. Checking one initial shouldn't cost you a download, a folder filling up with copies, and something to clean off your desktop on Friday.

Doc Preview opens a document where it already sits, anywhere documents are listed: on a transaction, on the *Unassigned Docs* page, and while you work down the review queue. It reads in place, so paging through a contract, finding a date, or checking a signature happens without the deal ever leaving your screen. Comments sit right beside it, which is what makes a preview somewhere to work rather than just a window to look through.

The gain is fewer round trips, and a review pass that stays in one place from the first document to the last. When a preview won't build, the original is always a click away and untouched, so a PDF that refuses to render costs you a moment rather than a document. That's almost always the file itself, made by something the viewer can't read, and not anything wrong on your side.

How It Works

PDFs Read In Place

The previewer renders PDFs. Other file types — a `.jpg` or `.png`, for instance — open in a separate window from the preview's [Open Doc] button instead.

The Original Is Always There

Pipeline generates previews separately from the file you uploaded, so [Open Doc] gives you the document exactly as it arrived, whatever the preview looks like.

A Changed Doc Gets a New Preview

After a doc is uploaded, rotated, merged, or broken apart, Pipeline rebuilds its preview — usually a second or two, occasionally up to about 30 seconds.

Preview a Doc

Click a doc's name to read it right on the page, without downloading it.

Who Can Do This: Anyone who can see the doc's permission category.

To preview a doc:

1. Go to the transaction, the Unassigned page, or wherever the doc is listed.

2. Click the doc's name.

The doc opens in a preview window below its row. Click the name again to close it.

Move Between Pages in a Preview

Use the page arrows in the top bar or your keyboard to move through a long doc.

Who Can Do This: Anyone who can preview the doc.

To move between pages in a preview:

1. Open the doc's preview.
2. Click the arrows beside *Page X of Y* in the top bar to step forward or back. The control stays in view as you scroll.
3. Or, with your cursor outside any text field, press the left and right arrow keys — or type a page number to jump straight to it.

The preview moves to that page without you scrolling back to the top.

Change the Preview Size

Set how large previews display once, and Pipeline applies it to every doc you open after that.

Who Can Do This: Anyone who can preview a doc. The setting is yours alone.

To change the preview size:

1. Open any doc's preview.
2. Click the size selector in the upper-left corner of the preview window.
3. Choose the size you want.

Pipeline saves your choice and opens every future preview at that size.

Open the Original Doc

Open the file exactly as it was uploaded — useful for image files, and for any doc whose preview doesn't look right.

Who Can Do This: Anyone who can see the doc's permission category.

To open the original doc:

1. Click the doc's name to open its preview.
2. Click [Open Doc].

The original file opens in a separate window, unchanged from the version you uploaded.

Leave a Note on What You're Reading

Page three is missing an initial and you're looking straight at it. There's nowhere inside the preview window to say so; the note goes on the doc's own row instead, and from there it reaches whoever uploaded the file.

Leave a note right on a doc and it travels with the document — your team sees it, the agent hears about it, and *Transaction History* keeps the record.

See Doc Comments

Frequently Asked Questions

Do I have to download a doc to read it?

No — click its name. The doc opens in a preview window right where it's listed, and clicking the name again closes it.

Can I preview a photo or a Word document?

The previewer renders PDFs. Other file types are still stored and available — click the doc name, then [Open Doc], and the original opens in a separate window. Offices that want everything to preview in place restrict uploads to PDFs.

How do I jump to a specific page?

Type the page number, or use the arrows. The *Page X of Y* control in the top bar stays visible as you scroll. With your cursor outside a text field, the left and right arrow keys work too.

Can I make previews bigger?

Yes, and you only set it once. Click the size selector in the upper-left corner of any preview. Pipeline remembers the size and uses it for every doc you open after that.

Can I add a comment from inside the preview?

Not from inside the preview window. Add doc comments from the doc's own row while the preview is open below it.

Why doesn't an older doc have a preview?

Previews aren't available for some docs added before 2021. The documents themselves are intact — click [Open Doc] to view, download, or email the original. Anything uploaded or merged since then previews normally, even on an old transaction.