

Transaction Docs List

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Every doc on a transaction lives in one list. Sort it the way you work, and Pipeline remembers your choice on every transaction after that.

Introduction

Scroll down any transaction and you reach its documents: everything anyone has uploaded, emailed in, or assigned to that deal, gathered in one place. It's the part of a transaction people spend the most time inside.

The list groups itself by permission category rather than by anything you arrange, which is why there aren't folders in here. That grouping is telling you who can see what, not what kind of document each one is. Inside the groups, the arranging is yours. Click a column heading to sort, collapse the sections you aren't working in today, and Pipeline carries that setup to the next transaction you open instead of making you build it again.

So the list learns how you work once and then stays out of the way. It's also behind the most common scare on a transaction. A document that shows in the history but not in the list has usually not gone anywhere: its category is collapsed on your screen, and expanding it brings the doc straight back.

How It Works

The docs list is a set of sortable columns grouped under permission categories, with a gear on every row for the actions you can take on that file.

What Each Column Tells You

A doc's row shows its **Label**, its **Document Name**, the **Added On** date, and its review status. Each of those is a sort option.

Docs Sit Under Their Permission Category

Pipeline groups docs by the permission category they were filed under, and each category expands and collapses on its own. Pipeline remembers which ones you left open and shows them the same way on the next transaction.

Your Sort Order Is Yours

Sorting is a personal preference saved to your login and browser, not a setting for the office. Change it and your teammates' lists stay exactly as they had them.

It Follows You From Transaction to Transaction

Whatever column you sorted by last is the order every transaction's docs appear in until you change it. That's why a list can look wrong long after the click that changed it.

Docs With Matching Names Stack Together

When your office has doc name grouping turned on, docs sharing a name collapse into a single group with the most recent version on top — click the group to see every version underneath.

There's No Manual Drag-and-Drop Order

You can't drag docs into a custom sequence. Offices that need a fixed order number their doc names —

01 Listing Agreement , 02 Disclosures — and sort by Document Name, which produces exactly that order.

Sort a Transaction's Docs

Click a column heading to sort the docs list by it, and click the same heading again to reverse the direction.

Who Can Do This: Anyone who can see the transaction.

To sort a transaction's docs:

1. Open the transaction and scroll down to its docs.
2. Click the heading of the column you want to sort by — **Label**, **Document Name**, **Added On**, or review status.
3. Click the same heading again to flip between ascending and descending order.

The arrow beside the heading shows the direction, and Pipeline saves the choice — every transaction you open next uses it. Sorting by label leaves docs without a label at the bottom of the list.

Expand or Collapse a Permission Category

Open the categories you're working in and close the ones you aren't; Pipeline remembers the choice for next time.

Who Can Do This: Anyone who can see the transaction, for the categories they have access to.

To expand or collapse a permission category:

1. Open the transaction and scroll down to its docs.
2. Click [+] next to a category name to expand it, or [-] to collapse it.

Pipeline keeps that choice and shows the category the same way on every transaction from then on. If a doc a teammate mentions isn't in the list, a collapsed category is the first thing to check.

Group Docs When There Are No Folders

The headers on this list are permissions, not filing, and there's no second level underneath them to build folders out of. Offices that want disclosures sitting together and closing paperwork sitting somewhere else put the grouping on the documents themselves, then sort by it.

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](#)

Transaction Docs List FAQ

A transaction's docs sort by column, and Pipeline remembers the column you chose. Answers to the common questions about sort order, grouped docs, and getting docs into the order you want. See [Transaction Docs List FAQ](#).
