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.

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

Send a Doc for Signature

When a doc on the transaction needs signing, send it for signature from right there. With your own DocuSign account connected, the signed copy syncs back to Pipeline already pre-assigned to the same deal.

Connect your own DocuSign account to Pipeline and send documents for signature without leaving a transaction — signed copies come back on their own.

See DocuSign Integration

Frequently Asked Questions

Why did my documents stop showing in alphabetical order?

Pipeline remembered a sort you set earlier. Click the **Document Name** heading to sort alphabetically again — and click it once more if it comes back Z–A.

Can I drag documents into whatever order I want?

No — there's no drag-and-drop ordering. Offices that need a fixed sequence number their doc names (`01 Listing Agreement` , `02 Disclosures`) and sort by Document Name, which produces exactly that order.

What can I sort the docs list by?

Label, Document Name, Added On date, or review status. Click a heading once to sort by it and again to reverse the direction.

Does my sort order change what my teammates see?

No, it's yours alone. The sort is saved to your login and browser, so everyone sets their own. If a colleague needs a different order, they set it on their side.

Why do docs without a label sit at the bottom when I sort by label?

Unlabeled docs aren't part of a label sort. They collect at the bottom of the list until they're given a label.

A teammate uploaded a doc and I can't find it. Where is it?

Nine times out of ten, its category is collapsed. Click [+] beside the category name to expand it. If the doc still isn't there, it's in a permission category your role can't see, and an admin can move it or open up access.