Doc Notifications

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Get an email the moment an agent adds a doc to a transaction — so nothing waits in a queue for you to notice it.

Introduction

Most offices have someone whose job is to know what came in. Without a nudge, that means refreshing *Unassigned* and *Unreviewed* through the day and hoping nothing slipped past between looks.

Doc Notifications are Pipeline doing the watching instead. The subscription belongs to the person rather than to the account, which is the part that catches offices out: a new compliance admin starts out hearing nothing, and nobody can switch her on from the outside. The upside of the same design is that nobody can switch you off either. What reaches you then follows what you can already see, so the notification widens and narrows on its own as your permissions change, and there's nothing to maintain.

The refreshing stops. Each email arrives with enough detail to triage from your phone, so you can decide whether something needs you now or can wait until you're back at a desk. If you're expecting these and nothing is arriving, check the spam folder before you change anything. Filtered notifications look exactly like missing ones, and that's the most common reason people conclude the setting broke.

How It Works

Two things decide whether an email reaches you: whether you've subscribed, and which transactions you can already see.

Everyone Subscribes for Themselves

This lives in your own profile, not in an admin screen. That means no one can switch it on for you, and no one can switch it off for you either. If a colleague is drowning in notifications, they have to uncheck the box themselves.

It's also per account. If you're in more than one Pipeline account, turn it on in each one.

Agent Uploads Trigger It, Admin Uploads Don't

The notification fires when an *agent* adds a doc. When another admin adds one, nothing sends. This surprises people who expect to hear about everything, so it's worth saying plainly: to keep an eye on what admins are adding, watch the *Unreviewed* page instead.

Four Things Count as Adding a Doc

You'll get an email when a doc is:

- **Uploaded** directly into a transaction
- **Assigned** from Unassigned onto a transaction
- **Broken apart** on a transaction
- **Merged** on a transaction

Emailing a doc into a maildrop address isn't on that list by itself. The notification follows the doc onto the transaction, so it sends at the moment the doc is assigned.

You Hear About the Transactions You Can Already See

Notifications follow your access. You get them for transactions in any location where you hold the **View All Transactions** permission — so the setting widens or narrows on its own as your permissions change. There's no way to subscribe to one location, one agent, or one document name.

What the Email Tells You

Each notification names the doc, the agent who added it, and the transaction it went to, so you can usually triage it without opening Pipeline at all.

Why an Agent Sees an "Email Sent To..." Banner

When an agent uploads and assigns a doc, they sometimes see a banner reading *"Email sent to..."*. That's this notification, confirming which admins were told. It appears because someone on the account has the setting on, not because the agent did anything extra.

Turn Doc Notifications On or Off

> One checkbox in your own profile decides whether agent doc uploads reach your inbox.

> **Who Can Do This**: Anyone — it's a personal setting, and each user sets their own.

To turn doc notifications on or off:

1. Click the [Gear] in the upper-right corner, then [My Info].
2. Under **Your Email Settings**, check or uncheck **Receive notification when agent adds doc to a transaction**.
3. Click [Save Settings].

The change takes effect on the next doc an agent adds. Nothing already sent is affected.

Watch Everything That Lands, Not Just Agent Uploads

Because the notification fires on agent uploads only, docs your own staff add never reach your inbox. If your job is to know what came in, no matter who put it there, a subscription is the wrong instrument for it.

Every doc assigned to a transaction lands on the *Unreviewed* list and stays there until an admin signs off on it — one running worklist of what's outstanding across your whole office.

See Unreviewed Docs List

Doc Notifications FAQ

Doc Notifications are a personal email subscription that fires when an agent adds a doc to a transaction you can see. Answers to the common questions about who can subscribe, why admin uploads stay quiet, and how to stop the emails.

See Doc Notifications FAQ

Doc Notifications Troubleshooting

Notifications arriving for the wrong person, or not arriving at all? Start here.

- Why Aren't Doc Notifications Reaching the Right People?