Know the Moment a Document Lands

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A document arrives and nobody knows until someone thinks to look. Set up the alert that suits how you actually work — an email per upload, a count on your Home page, or a signal for the one form you're waiting on.

Introduction

Waiting is the expensive part of document review. A disclosure comes in at 4pm, sits in the queue overnight, and the first anyone hears of it is when the agent asks why it hasn't been reviewed. Nothing was broken. Nobody was told.

Pipeline gives you three different ways to be told, and they suit three different temperaments. There's an email for every upload, for people who want to know now. There's a count on the Home page, for people who'd rather check than be interrupted. And there's a way to get a signal for one specific document, which is what most people are really asking for when they ask about alerts.

When to Use This

- Documents are sitting in the queue for hours because nobody knows they arrived.
- You want a staff member — not you — to be the one who hears about uploads.
- You only care about one form, like the listing agreement, and don't want an email for everything else.
- You run several offices and only want the alerts for yours.
- You turned something on and it's telling the wrong person, or telling you about the wrong thing.

1. Turn the Notification On in Your Own Profile

This is the setting people mean when they say "document notifications," and there's one rule that catches everybody: each person turns it on for themselves. There's no admin screen where you switch it on for a staff member — you point them at their own profile and they check the box.

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

See Doc Notifications

> Working with a transaction coordinator who wants these alerts? They'll need to be a user on your account and be working through their own maildrop address — the notifications follow the profile, so an outside coordinator with no login has nothing to attach them to.

2. Check Which Alert You Actually Turned On

Two settings sit near each other and do opposite things, and mixing them up accounts for most of the "it's notifying the wrong person" reports.

Doc notifications tell **you** that somebody else uploaded something. Acknowledgement receipts tell **whoever emailed docs in** what arrived and what didn't — they write back to the sender, always the profile owner, never a third party. If you want a colleague to get receipts for their own uploads, they check that box in their own profile too.

Email docs into Pipeline and get a receipt back telling you what uploaded, what didn't, and why.

Ask Pipeline to write back every time you email docs in, and you'll know what uploaded and what didn't without going to look.

See [Email Acknowledgement]

3. Narrow the Alerts Down to Your Own Office

Run more than one location and the notification email is more useful than it looks — it names the location the transaction belongs to, both in the message and in the mail headers.

That's the hook for a rule in your own email program. Route the alerts for your office into a folder you watch and let the rest go somewhere quieter. It's a filter you write once, in the tool where you already read mail, and it turns an account-wide feed into your feed.

4. Watch the Home Page Counts Instead of Your Inbox

Not everyone wants an email per upload, and for a busy office that's a lot of email. The alternative is to check rather than be told: your Home page carries live counts of what's waiting to be filed and what's waiting to be reviewed, with the list one click away.

Your Home page opens on a row of live counts: closings this week, tasks due today, docs waiting on you — so you can see what needs attention before you click into anything.

See [Stat Tiles]

> If you remember counts in the top menu bar, they were retired — recalculating them on every click for every user was slowing the whole system down. The Home page blocks are where those numbers moved, and they open the full list rather than just showing a number.

5. Get a Signal for One Specific Document

There's no alert that fires only when a listing agreement arrives, and it's worth saying plainly so you don't go looking for the setting. What you can do is arrange a signal you'll notice, and there are two shapes of that.

Use the checklist. Put the document on the checklist as its own task and ask agents to check it off when they upload. Their check marks it agent-checked rather than complete, so it lands on your Tasks page as something waiting on you — the form you were watching for, announced by the person who sent it.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See [Agent Checked Tasks]

Or use a label. Give the document type its own doc label, then filter the *Unreviewed* page by that label and work only those. It's a pull rather than a push — nothing arrives in your inbox — but it gets you to one kind of document in one click.

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]