Activity History FAQ

Last Modified on 09/04/2026 11:14 am EDT

A transaction's history records what happened on it, who did it, and when. Answers to the common questions about what's tracked, what isn't, and how to trace a change.

Does the history show who made a change and when?

Yes. The Transaction History records every action on a transaction from the moment it's created — what changed, who made the change, and when it happened — and you can search it. See Activity History.

What activity gets recorded?

Docs, notes and emails, checklists and tasks, and updates to the transaction's own fields. That covers document uploads, assignments, and deletions; notes and emails sent from the transaction; adding, updating, removing, and checking off tasks; and changes to transaction fields and contacts.

Can I see who deleted a transaction?

No. A transaction's history lives on the transaction, so deleting the transaction removes its history too — there's no account-level log of deletions and no way for you or our support team to identify who performed one. What narrows it down is that only master admins can delete a transaction, so the change came from one of the master admins on your account.

A transaction is missing — can you help?

Yes, if you can name it. Email us the transaction's name and any identifying details and we'll check whether it was deleted; if it was recently deleted, our Tech Team can often recover it and restore it to your account. It's also worth checking whether the transaction was renamed rather than deleted.

Can I see who deleted a document or a CDA?

Yes. Unlike a deleted transaction, deleting a document or a CDA is activity *on* a transaction, so the history records it with the person and the timestamp. If a CDA disappeared unexpectedly, note that moving past the first step of Update Commissions deletes the existing CDA to make room for a new one — even if you don't finish and save.

Can I see who changed an agent's permissions?

No — permission changes aren't transaction activity, so they're not in the history. There's no log of who changed a user's permissions or when. Because changing permissions is an admin-only function, the change was made by a master admin or an admin with the "Create locations and users" permission on your account.

Does it track changes made outside a transaction?

No. The history covers one transaction's activity and nothing else — changes to Company Settings, Checklist Templates, user profiles, and transaction plans aren't tracked anywhere you can view. Note the boundary on checklists: edits to a *Checklist Template* aren't recorded, but once a checklist is on a transaction, every task change on it is.

Does the history show an IP address or who was signed in?

No. Actions are attributed to the Pipeline profile that was signed in when they happened, and nothing further — no IP address, no session details. So if the history shows a document uploaded by a particular user, it means that action was taken while signed into that user's profile; the usual explanation for a surprising name is that someone was working in another person's profile.

Will renaming a user profile affect the history?

Yes — and we recommend against it. Renaming a profile retroactively updates the historical record, so past actions get attributed to the new person and it's no longer clear who actually did what. When someone's replacing a departing person, deactivate the old profile and create a fresh one instead; if you need the old email address, change it on the old profile first to free it up.

If I deactivate a user, do I lose their activity history?

No. Deactivating a user deletes nothing — their transactions and all their historical activity stay in the account for history and auditing. They lose access and drop off the active User List, and their email address is freed up for use elsewhere.

Learn More

Pipeline records every change on a transaction — search that history by action, person, or date.

See [Activity History]

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.