Activity History

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

Introduction

Most days, nobody asks about a transaction's past. Then an auditor wants to know when a disclosure came in, or a field doesn't match what you remember. Now the order of events is the whole question.

Every transaction in Paperless Pipeline has a Transaction History. It's a running record of the work done on that deal since the day it was created. It builds itself. Nobody turns it on, and nobody has to keep it up. That's why it's useful later, because it shows what was actually done, not what someone remembered to write down. Coordinators use it to confirm paperwork landed, and admins use it to settle a question about a change. Agents use it to check their own file.

The payoff is a date instead of a guess. You might be answering an auditor, checking that a doc was in before closing, or finding out when something on the deal changed. Either way, the record was being kept while you did the work. If you can't spot what you need, the answer is usually to narrow the list. It's rarely a gap in the history.

How It Works

The Transaction History lives on the transaction itself. You can search it instead of scrolling through every entry.

What's Recorded

The history records the updates made on the transaction along the way. That gives you a clear record of what changed and when.

Where to Find It

Open a transaction and click [Transaction History] from the left menu to see all of its activity. See Transaction Details.

Searching the History

You don't have to read the whole list. Search the history by the type of update, the person who made it, or the time period. It's a fast way to check one action or narrow to a date range.

Who Sees What

Agents and admins can both view a transaction's history. Each one sees the information that fits their role on the transaction.

Search a Transaction's Activity History

Open the Transaction History and search it by update type, person, or time period.

Who Can Do This: Agents on the transaction and admins. Each sees the activity that fits their role.

To search a transaction's activity history:

1. Open the transaction.
2. Click [Transaction History] from the left menu.
3. Search by the type of update, the person who made it, or the time period you want.
4. Review the matching activity.

You'll see only the entries that match. Now you can confirm an action or trace what happened without scrolling through everything.

Trace a Document Instead of a Deal

A transaction's history covers only that one deal. It can't answer a question that crosses deals. Maybe a document ended up on the wrong file, or you need every upload made under one person's name last Tuesday.

Every doc filed out of Unassigned leaves a record — search it by doc, by transaction, or by the person who did the filing.

See Assignment History

Frequently Asked Questions

Does the history show who made a change and when?

Yes. The Transaction History records every action on a transaction from the day it's created. It shows what changed, who changed it, and when, and you can search it. See Activity History.

What activity gets recorded?

Docs, notes and emails, checklists and tasks, and changes to the transaction's own fields. For docs, that's uploads, assignments, and deletions. For notes and emails, it's anything sent from the transaction. For tasks, it's adding, updating, removing, and checking them off. It also records changes to the transaction's fields and contacts.

Can I see who deleted a transaction?

No. A transaction's history lives on the transaction. When the transaction is deleted, its history goes with it. There's no account-wide log of deletions, so neither you nor our support team can tell who deleted it. What narrows it down is that only master admins can delete a transaction, so one of the master admins on your account made the change.

A transaction is missing — can you help?

Yes, if you can name it. Email us the transaction's name and any details that identify it, and we'll check whether it was deleted. If it was deleted recently, our Tech Team can often recover it and put it back in your account. It's also worth checking whether the transaction was renamed instead.

Can I see who deleted a document or a CDA?

Yes. Deleting a document or a CDA is activity *on* a transaction, unlike deleting the transaction itself. So the history records it, with the person and the date and time. If a CDA disappeared without warning, check Update Commissions. Moving past its first step deletes the existing CDA to make room for a new one. That happens even if you don't finish and save.

Can I see who changed an agent's permissions?

No. Permission changes aren't activity on a transaction, so they're not in the history. Pipeline keeps no log of who changed a user's permissions or when. Only admins can change permissions, so the change came from a master admin, or an admin with the "Create locations and users" permission on your account.