Activity History

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

Introduction

Most days a transaction's past doesn't come up. Then an auditor asks when a disclosure was turned in, or a field reads differently than you remember, and the order of events becomes the whole question.

Every transaction in Paperless Pipeline carries a Transaction History, a running record of the work done on that deal from the day it was created. It builds itself. Nobody switches it on and nobody keeps it up, which is exactly what makes it worth something later, because it reflects what the account actually did rather than what someone remembered to write down. Coordinators use it to confirm paperwork landed, admins to settle a question about a change, agents to check their own file.

The payoff is a date instead of an impression. Whether you're answering an auditor, checking that a doc was in before closing, or working out when something on the deal changed, the record was already being kept while you were doing the work. If you can't spot what you're after, it's usually a matter of narrowing the list rather than a gap in the history.

How It Works

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

What's Recorded

The history captures the activity on the transaction — the updates made along the way — so there's 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 its full activity. See Transaction Details.

Searching the History

Rather than read the whole list, you can search the history by the type of update, the person who made it, or the time period — a fast way to verify a specific action or narrow to a date range.

Who Sees What

Both agents and admins can view a transaction's history, and each sees the information relevant to 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 relevant to 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're interested in.
4. Review the matching activity.

You'll see just the entries that match, so you can confirm an action or trace what's happened without scrolling through everything.

Trace a Document Instead of a Deal

A transaction's history is scoped to one deal, so it can't answer a question that crosses deals — a document that ended up on the wrong file, or a run of uploads 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