Prove When a Document Arrived and Who Reviewed It

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An auditor doesn't want the document. They want to know it arrived on the fourteenth and that a broker read it on the fifteenth. Pipeline has been keeping that record the whole time.

Introduction

Pipeline writes every action on a transaction to its history: the upload, the email that carried it in, who filed it, the comment someone left, the moment it was marked reviewed, and any deletion. Each entry carries a timestamp and a name, and nobody can edit it after the fact — which is what makes it usable as an audit trail rather than a convenience.

That record has three exits, and which one you reach for depends on who's asking. The history on screen answers a question about one transaction. The log file inside a download answers an auditor who wants something to keep. Assignment History answers a question about your own team.

When to Use This

- A state audit is asking for proof that documents were submitted within the required window.
- Your broker needs to show that every file was reviewed, and when.
- Someone says a document was never sent and you need to show the date it landed.
- A document disappeared and you need to know who removed it.
- You have three admins filing documents and you need to see who handled a specific one.

1. Read the History on the Transaction

Start here for a single deal. The transaction's history holds every event on that file; filter it to document activity and you get the uploads, the email-ins, the assignments, the comments, the reviews, and the deletions — each with the date, the time, and the person.

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

See Activity History

2. Know the Difference Between Uploaded and Assigned

The log distinguishes the two, and the distinction is the one auditors care about.**Uploaded** is when the document reached Pipeline. **Assigned** is when someone filed it onto this transaction. A document emailed in on the third and filed on the fifth shows both dates, and the first one is the one that answers "when did you receive it."

Reviewed is its own event again, with its own timestamp and its own name attached.

You sign off on a doc by checking **Reviewed** — that clears it from the queue, locks it against edits, and records who reviewed it and when.

See Doc Review

3. Take the Log Offline

When the auditor wants something they can hold, the same history ships as a plain text file — `Activity_Log.txt` — inside every transaction download and every monthly backup. It's the full lifecycle of each document on that transaction, in one file, with nothing to log into.

Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

See Individual Transaction Downloads

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

> Open that text file and search it for *reviewed* — every review entry, with its date and its reviewer, pulls out in one pass. That's your answer to "show me that these were all signed off."

4. Use Assignment History for the Unassigned Queue

When the question is about your own team rather than an auditor — which of your three admins filed this, and when — the record lives with the queue the document came out of.

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

5. Say Plainly What the Record Does and Doesn't Show

Pipeline records who reviewed a document and when. It doesn't print initials or a stamp onto the page itself, and auditors who are used to wet-signed review boxes sometimes expect that.

The answer is straightforward: the review evidence is in the history and in the log file, permanently and unalterably, which is a stronger record than initials in a margin. If your office wants something visible on the document as well, a comment on the doc carries the note and the name alongside it.

Leave a note right on a doc and it travels with the document — your team sees it, the agent hears about it, and *Transaction History* keeps the record.

See Doc Comments

> Getting the records themselves into an auditor's hands is a separate job. SeeGive an Auditor What They Need, Not Your Whole Account for a subset of transactions, or Produce Your Records for a State Audit when the period reaches back years.