See What Changed Since You Last Looked

Last Modified on 11/10/2026 12:21 pm EST

Yesterday's uploads, the tasks your agents checked overnight, the deals that moved status, and the files that got mail each surface somewhere in Pipeline. Know where, and the morning opens on the change instead of the hunt for it.

Introduction

Most of the questions we hear about recent activity are not questions about reports. An admin wants to know what came in after she left yesterday. A broker wants the deals that moved to Listed this week. A coordinator wants to know whether the disclosure an agent swears he sent actually arrived, and where it went. Each one lives in a different corner of Pipeline, and the answer is usually already sitting there.

Pipeline records the moment a transaction is added, updated, or changes status. It records when a document arrives, when someone files it, and when an agent checks a task. What it does not do is put all of that on one screen. So the skill is knowing which page answers which question. The morning email covers yesterday and the Home page covers the queue. The Unassigned page knows who filed what, and the Transactions page answers anything with a date on it.

Once you know where each one lives, most of them can be saved as a click in your left menu. Your day opens on what changed, and the audit questions and the productivity questions get answered from the same places when they come up.

When to Use This

- An agent says a document went in, it is not on the transaction, and two people are now looking for it.
- You want to see what was added or changed status this week without opening every transaction.
- You want an email each time an agent uploads a doc, or you are getting them and want to know how to stop.
- You suspect some of the logins you set up months ago have never been used.
- A lender replied to a transaction email and nobody saw it for days.

1. Read Yesterday in One Email

Before you open anything, the previous day can already be in your inbox. The daily activity email lists the transactions created yesterday, the ones that changed status and what each moved to, and how many docs are still sitting unassigned. It is a personal setting on your own profile, so each admin turns on their own, and nobody can turn it on for a colleague. Only two things put a transaction in it: being created, and changing status. A close date that moved does not.

Every morning, a single email tells you what happened in your account the day before — the transactions added, the ones that changed status, and how many docs are still sitting unassigned.

See Daily Activity Emails

2. Know When an Agent Adds a Doc

When agents upload straight onto transactions, one checkbox tells you each time it happens. Click the [Gear] in the upper-right corner, then [My Info], and check **Receive notification when agent adds doc to a transaction** under Your Email Settings. Each email names the doc, the agent, and the transaction, so you can triage it from your phone. Three things about it catch people out. It fires on agent uploads and not on docs an admin adds. It follows your access, so you hear about transactions in the locations where you hold **View All Transactions**. And a doc emailed to a maildrop address triggers it when the doc is assigned, not when it lands in the queue.

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

The other setups for hearing about arrivals, including a signal for one specific form, are in Know the Moment a Document Lands.

The second signal comes from the checklist. When a task stands for a document and the agent checks it after uploading, the task turns agent-checked and waits on you. On the Tasks page, filter by [Agent Checked] and you have the documents your agents say are ready, across every transaction you can see; add an agent's name to the filter to watch one person. Open the transaction, read the doc, and check the task to complete it, or hover over it and click the red [X] to send it back. What that mark means is in Use the Features People Write In to Ask About, and the review routine built on it is in Review Your Agents' Work Before It Counts as Done. One naming habit helps agents keep up: name the task after the document, and clicking the doc on the transaction highlights its matching task, which is in Work Pipeline Like a Power User.

Narrow the Tasks page to an exact set — search by task or transaction name, then filter by @mention, agent, due date, status, and more.

See Tasks Search

3. Route Every Agent Upload Through Unassigned

Many offices want an admin's eyes on a document before it reaches the transaction. The lever is one permission. Leave **Assign docs to transactions** unchecked on an agent's profile, and everything they add stops in Unassigned Docs until an admin files it. That holds whether they uploaded on the transaction, emailed a maildrop address, or uploaded to the Unassigned page. The upload still succeeds, so the agent is never stuck. The doc gets its name and its permission category from you on the way onto the transaction. You grant the permission per location from the agent's profile under [Admin / Settings], then [Manage Users].

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

4. Watch the Queue From the Home Page

Once uploads flow through the queue, the Home page tells you what arrived. Click [Show List] on the Unassigned Documents block and it shows how many docs came in today, yesterday, and this week, each a click away. Pipeline keeps the blocks the way you leave them, so the snapshot is still open tomorrow morning until you close it. Click the block's name to land on the full Unassigned page. If you remember counts in the top menu bar, those were retired in 2020 and the Home page blocks are where they moved.

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

5. Sort the Queue So the Newest Sit on Top

On a long queue, sort instead of scrolling. Click a column heading on the Unassigned page and the list re-orders straight away, so you can put the docs added most recently at the top. The choice lasts for that visit only, and there is no saved default sort. When agents put the property address in the email subject, sorting by Email Subject or Source groups a deal's docs together instead, and Work the Unassigned Queue Fast builds a whole filing routine on that.

Fifty rows in the queue and you want one of them. The Unassigned page has its own search field and sortable columns, and both behave in ways worth knowing before you decide a doc isn't there.

See Unassigned Docs Search

6. Trace Who Filed What, and Where

When the question is not what arrived but where it went, open Assignment History from the left menu of the Unassigned page. Every doc filed out of the queue writes one line: the transaction it went to, who assigned it, and when, newest first. Search it by doc, by transaction, or by the person who did the filing, and narrow it to a date range. It is built for recent activity rather than the archive, so an old assignment can fall outside the view; for anything older, email us the doc name and the dates. Master admins see the whole company, and other roles may see less. It records assignments only. A doc that is not there was deleted or never arrived, and the transaction's own history holds everything that happened after the filing.

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

For the full trail on one deal, with uploads, reviews, and deletions timestamped, open that transaction's Activity History. Handing that record to an auditor is in Prove When a Document Arrived and Who Reviewed It.

7. Pick Up Where You Left Off

The transactions you touched most recently are the ones you will open again. Recently Viewed on the Home page holds your last five. The Transactions page adds two lists of its own in the left menu, Recently Updated and Recently Created, which surface the transactions you've touched or added most recently. None of these is an audit. They are where you start when you know you were in a file an hour ago.

Recently Viewed keeps your last five transactions one click away on the Home page, so picking up where you left off doesn't mean searching for it again.

See Recently Viewed

The Transactions page lists every transaction you have access to — shaped by the columns you pick, the order you sort, and the scope you set.

See Transactions List

8. Sort the Transactions Page by What Moved

Sorting floats recent activity to the top of the list. Open the [Sort] tab on the Transactions page and three choices are built for this: Added On, Updated On, and Status Changed On. Pick one and the list re-orders by that date, and the column you sorted on appears in place of Close Date so you can read the dates. Click the arrow beside it to flip the order. The Transactions page starts fresh on each visit, so save the sorted view as a shortcut when you want it back tomorrow. How a sort swaps the column, and what else the page can become, is in Turn Any Page in Pipeline Into a Report.

Sort any list on the column that matters to the job in front of you. Which lists hold that order for next time, and which start fresh, is worth knowing before you set one.

See List Sorting

9. Pair a Status With Status Changed On

Status Changed On earns its keep next to a status. Filter the list to a Status of Listed, then sort by Status Changed On, and you have every current listing in the order it became one, with the date each moved. Do the same with Fell Through to see what died this week, or with Closed to see deals by the date they were closed out rather than by their close date. To narrow to a window instead of sorting, open More Search Options and set Status Changed On to a range alongside the status. Pipeline sends no alert when a status changes; Catch Status Changes Without Watching the Transactions List covers the four things that stand in for one.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

10. Search Inside a Window, Then Save It

Sorting shows the order; searching shows only the window. In More Search Options, the date type list holds Added On, Updated On, and Status Changed On, each with preset ranges such as Today and This Week and a custom range you set. Added On for this month is the count of transactions you opened. Updated On for today is what changed since morning. On a busy account the short ranges do the work; Last Year tells you little about this week. A fourth type, Email Received, lists every transaction that got an email in the window. It's the nearest thing to a mail alert, and Send and Track Email Without Leaving the Transaction builds it out. Whichever you run, click [Add Shortcut] and it sits in your left menu, re-run fresh each time you click it.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

11. Measure the Month, Not the Morning

The daily places tell you about today. For the wide view, a master admin runs Usage by Agent under Reports, for the last 30, 60, or 90 days, a calendar year, or a date range you set. Each user gets a row with docs uploaded, docs reviewed, transactions created, maildrop use, and logins in the period. A blank Last Login is someone who has never signed in, and Has Temp Password reads Yes for anyone who never acted on their welcome email. The adoption check built on it, resending welcomes from Manage Users included, is in Find Out Who Is Actually Using Pipeline.

Download the Usage by Agent report to see who's logging in, who's uploading, and who hasn't touched Pipeline at all.

See Usage by Agent