Unreviewed

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The compliance queue: every doc assigned to a transaction waits here until an admin signs off, and this is where the sign-off, the comments, and the labels happen.

Introduction

Every document that lands on a transaction appears on the Unreviewed list and stays there until an admin checks Reviewed. Reviewing clears it from the queue, locks it against edits, and records who signed off and when.

Not every office reviews, and nothing breaks if yours does not. Where it is in use, this page is the running worklist of what still needs a look across the whole office.

The Queue

What Is Waiting for Sign-Off

One running list of everything outstanding across the office, and what you can do from the list without opening each file.

Every doc assigned to a transaction lands on the *Unreviewed* list and stays there until an admin signs off on it — one running worklist of what's outstanding across your whole office.

See Unreviewed Docs List

Cut It Down to the Handful You Want

The page carries its own search, filters, and sortable columns, and they stack.

The *Unreviewed* page carries its own search, filters, and sortable columns, so a list hundreds of docs long becomes the handful you want to work first.

See Unreviewed Docs Search

Signing Off

Mark a Doc Reviewed

Checking Reviewed records who signed off and when, and locks the document. Review it when you mean it.

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

Track What Reached Your Accounting System

If your office keys closed files into QuickBooks or Lone Wolf, a second checkbox tracks what has crossed over.

Already keying closed files into QuickBooks, Lone Wolf, or another outside system? Turn on *Entered Docs* and every doc gets a second checkbox so you can track what's made it across.

See Entered Docs

Marking Up

Send One Back With a Note

A comment rides with the document, reaches the agent, and stays in the history.

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

Tag It for Sorting

Fourteen colours you name once. A label organizes and never changes who can open a doc.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See Doc Labels

Hearing About It

Know the Moment a Doc Lands

An email as each agent-added document arrives, turned on per person.

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

Get Your Comment to the Agent

A master admin decides whether a comment on a doc is emailed to the agent with a link to it.

An admin leaves a comment on a doc, and Pipeline emails it to the agent with a link straight to the document.

See Doc Comment Notifications