

Reviewing Documents

SUMMARY

The reviewed checkbox is used to ensure all documents have been independently reviewed for accuracy and completeness by your staff. In this article, you'll learn how to review documents within Paperless Pipeline.

IN THIS ARTICLE

1. [Unreviewed Page](#)
2. [Helpful Hints for Viewing Documents](#)
3. [Pipeline Pro Webinar: Time Saving Doc Review Tips](#)

 1:20

Unreviewed Page

The Unreviewed page allows staff to quickly see a list of all unreviewed documents across all transactions that require their attention. The number above the page shows how many documents need to be reviewed.

Unreviewed Doc Name	Transaction	Status	Location	Agents	Assigned ...	Closing	Reviewed
Final Loan Approval	1234 Oyster Avenue, York Har...	Listed	Atlantic office		26 mins ago		<input type="checkbox"/>
Addendum #2	1234 Oyster Avenue, York Har...	Listed	Atlantic office		May 16, 18		<input type="checkbox"/>
Notice to Prospective Buyer	1234 Oyster Avenue, York Har...	Listed	Atlantic office		May 16, 18		<input type="checkbox"/>
files	1124 Kyndall Lane (#2) (Listing...	Offer Pending	Atlantic office		May 15, 18	Apr 16, 18	<input type="checkbox"/>

Helpful Hints for Viewing Documents

Previewing Documents

When previewing a doc in either pop-out or inline modes, pressing **Shift + Up-arrow** or **Shift + Down-arrow** will show the previous or next doc preview, if available. [Learn more about Keyboard Shortcuts here](#) →

Filter Documents

You can filter documents by location or transaction status by choosing [FILTER].

Filtering docs allows a broker to prioritize the documents to review. The broker can save a filter to access later with just a single click by following the steps outlined here: [Saving Custom Searches & Sorts](#) →

Doc Comments

Doc comments are used for internal notes and informal communication

about a specific document. Admin and staff users can comment on any document, as well as edit or delete a comment. When an admin adds a comment to a doc, the comment will automatically be emailed to the agent on the transaction (if that feature is turned on).

If the comment bubble is blue, it means there is a comment on the document. You can also view all doc comments by clicking the blue [Show Comments] icon in the column header.

Unreviewed Doc Name	Transaction	Status	Location	Agents	Assigned ...	Closing	Reviewed
Final Loan Approval	1234 Oyster Avenue, York Har...	Listed	Atlantic office		26 mins ago		<input type="checkbox"/>
Addendum #2	1234 Oyster Avenue, York Har...	Listed	Atlantic office		May 16, 18		<input type="checkbox"/>
Notice to Prospective Buyer	1234 Oyster Avenue, York Har...	Listed	Atlantic office		May 16, 18		<input type="checkbox"/>
files	1124 Kyndall Lane (#2) (Listing...	Offer Pending	Atlantic office		May 15, 18	Apr 16, 18	<input type="checkbox"/>
Needs Monterey 2	1124 Kyndall Lane (#2) (Listing...	Offer Pending	Atlantic office		May 7, 18	Apr 16, 18	<input type="checkbox"/>
Cancellation of escrow	1124 Kyndall Lane (Listing) (Re...	Hollis Other	Atlantic office		May 3, 18	Apr 26, 18	<input type="checkbox"/>
Named Exclusions Addendum To Listing...	1124 Kyndall Lane (Listing) (Re...	Hollis Other	Atlantic office		Apr 25, 18	Apr 26, 18	<input type="checkbox"/>
Rental Application	1124 Kyndall Lane (Listing) (Re...	Hollis Other	Atlantic office		Apr 24, 18	Apr 26, 18	<input type="checkbox"/>
Amendment To Listing Agreement – 265...	1124 Kyndall Lane (Listing) (Re...	Hollis Other	Atlantic office		Apr 16, 18	Apr 26, 18	<input type="checkbox"/>
<i>Missing signatures on pg. 8 – Rachel M. (May 23, 2018)</i>							
1. Purchase contract	1124 Kyndall Lane (#2) (Listing...	Offer Pending	Atlantic office		Apr 16, 18	Apr 16, 18	<input type="checkbox"/>

View the Document's Transaction

Click on the transaction name to open a new window. This allows you to view the transaction and documents side-by-side to determine whether the document can be marked as reviewed.

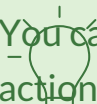
The screenshot shows a document viewer interface. On the left, a document titled "Amendment To Listing Agreement - 2650 Edgewood Ln" is open. A red arrow points from the transaction name "1124 Kyndall Lane" in the document list to the "View Transaction" button in the sidebar. Another red arrow points from the document title to the document content area. The sidebar contains a list of actions: Edit Transaction, Upload Docs, Assign Docs, New Offer, Transaction History, Deleted Docs, Received Emails (2), Download Transaction, and Update Commissions. The right panel displays transaction details for "1124 Kyndall Lane", including label (Residential), status (Hollis Other), location (Atlantic), total commission (\$75,000), MLS # (11242016), closed on (Apr 26, 18), sale price (\$750,000), and buyer (Odie).

Review the Document for Accuracy

When you've verified that everything in the document is correct and complete, you can mark the doc as reviewed. This is typically done by the principal broker or another admin user.

After the document is marked as reviewed, it will be removed from the Unreviewed page.

Unreviewed Doc Name	Transaction	Status	Location	Agents	Assigned ...	Closing	Reviewed
Final Loan Approval	1234 Oyster Avenue, York Har...	Listed	Atlantic office		26 mins ago		<input checked="" type="checkbox"/>
Addendum #2	1234 Oyster Avenue, York Har...	Listed	Atlantic office		May 16, 18		<input checked="" type="checkbox"/>
Notice to Prospective Buyer	1234 Oyster Avenue, York Har...	Listed	Atlantic office		May 16, 18		<input type="checkbox"/>
files	1124 Kyndall Lane (#2) (Listing...	Offer Pending	Atlantic office		May 15, 18	Apr 16, 18	<input type="checkbox"/>

 You can always track who reviewed the document (and other important actions) in the transaction's Transaction History.

Time Saving Doc Review Tips

This Pipeline Pro session covers ways to perform your doc reviews most efficiently. We'll go over tips that speed up the review process and save you time.

 10:27

[View more Pipeline Pro Webinars here →](#)