

Viewing History of Reviewed Docs for Compliance

SUMMARY

Paperless Pipeline helps you stay compliant by keeping a time and date log of every document you review.

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How to View History of Reviewed Docs for Compliance

To open the Unreviewed page:

- 1 Click [Unreviewed] to access the Unreviewed Docs page. This page lists all documents across all transactions that need to be reviewed. In a multi-location office, each location may be assigned a different reviewer.



- 2 Click on the name of the transaction you need to review. The transaction will open in a new popup window.
- 3 Click a doc to be reviewed. A quick preview of the document will open.
- 4 Once you're ready to mark it as reviewed, click the Reviewed checkbox. Repeat this process for the remaining docs you need to review.

Unreviewed Doc Name	Transaction	Status	Location	Agents	Assigned On	Closing	Reviewed
Transaction coversheet	9750 West Park Street, ...	Closed	Downtown O...		Sep 6, 16	Nov 22, 16	<input checked="" type="checkbox"/>
Testing Only - Lead Based Paint A...	1234 Geronimo Lane (L...	Closed	Downtown O...		Sep 1, 16	Sep 16, 16	<input type="checkbox"/>
Testing Only - Lead Based Paint A...	1234 Geronimo Lane (S...	Closed	Downtown O...		Sep 1, 16	Dec 26, 16	<input type="checkbox"/>
Short Sale Addendum to Contract	8400 West 15th Street, ...	Commission paid but not closed	Downtown O...		Oct 25, 16	Oct 28, 16	<input checked="" type="checkbox"/>

A time and date log of everything that was done in the transaction is kept in the Transaction History section. This includes broker reviews of documents.

- 1 Click [Transaction History] from the left menu of a transaction then hover over the date of any action to see the date and time the action was taken.

A screenshot of a transaction's activity history. On the left is a menu with options: Edit Transaction, Upload Docs, Assign Docs, New Offer, Transaction History (highlighted), Received Emails (0), Download Transaction, and Generate CDA. The main area is titled 'Activity History for 6778 Letterbox Lane, South Town, NY 22464' and shows a list of activities. A tooltip is visible over the date 'March 8, 2017 at 11:36 p.m. ET', showing the full date and time.

Type	Description	Action	Updated By	Updated On
Comment	Comment on "pdf": Wowowow			Mar 8th
Comment	Comment on "pdf"			Mar 8th
Comment	Comment on "pdf": Hello 2			Mar 8th

Download Transaction History

In case of an audit, the transaction history can be downloaded along with all documents within a transaction. This provides a complete date and time log of each document's review. To download a transaction's history:

- 1 Click [Download Transaction] to start a transaction download.



If you want to quickly see who reviewed a doc and when, go to the transaction and hover over the doc's icon. The reviewer's name and the date and time of review can be seen here.

