

Assign a Doc to a Transaction

SUMMARY Unassigned Docs is the general holding area for documents that have not yet been assigned to transactions. In this article, you'll learn how to assign Unassigned docs to transactions.

Short Version: 1) Click "Unassigned" from the navigation menu. 2) Locate the doc and click the green "Assign" button on its right. 3) Locate the desired transaction and click the green "Assign To" button next to it. 4) Name the doc and select its Permission Category. 5) Click "Assign Doc" to finish.

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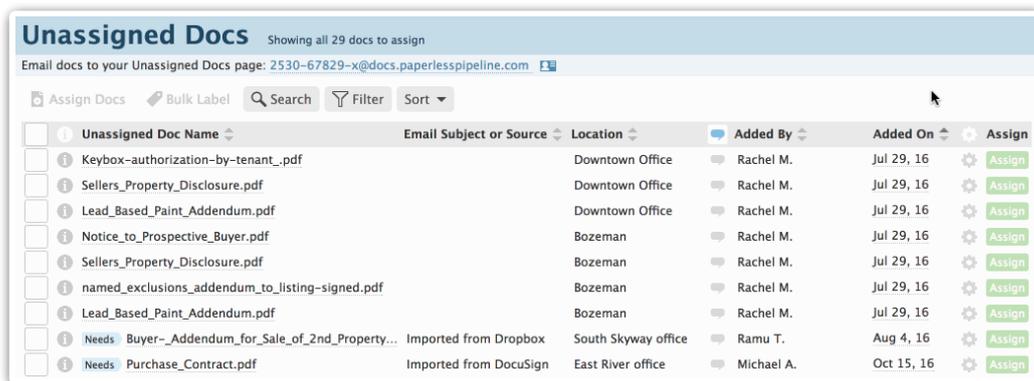
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Assign an Unassigned Doc to a Transaction

- 1 Click [Unassigned] from the top menu. Documents that have been directly uploaded into Unassigned docs are indicated by the green assign buttons.



The screenshot shows the 'Unassigned Docs' interface. At the top, it says 'Showing all 29 docs to assign'. Below that is a search bar and a filter dropdown. The main table has the following columns: 'Unassigned Doc Name', 'Email Subject or Source', 'Location', 'Added By', 'Added On', and 'Assign'. Each row represents a document with a checkbox on the left and an 'Assign' button on the right. The 'Assign' buttons are green, indicating they are directly uploaded. The first two rows have 'Downtown Office' as the location, while the others have 'Bozeman' or 'South Skyway office'.

<input type="checkbox"/>	Unassigned Doc Name	Email Subject or Source	Location	Added By	Added On	Assign
<input type="checkbox"/>	Keybox-authorization-by-tenant_.pdf		Downtown Office	Rachel M.	Jul 29, 16	Assign
<input type="checkbox"/>	Sellers_Property_Disclosure.pdf		Downtown Office	Rachel M.	Jul 29, 16	Assign
<input type="checkbox"/>	Lead_Based_Paint_Addendum.pdf		Downtown Office	Rachel M.	Jul 29, 16	Assign
<input type="checkbox"/>	Notice_to_Prospective_Buyer.pdf		Bozeman	Rachel M.	Jul 29, 16	Assign
<input type="checkbox"/>	Sellers_Property_Disclosure.pdf		Bozeman	Rachel M.	Jul 29, 16	Assign
<input type="checkbox"/>	named_exclusions_addendum_to_listing-signed.pdf		Bozeman	Rachel M.	Jul 29, 16	Assign
<input type="checkbox"/>	Lead_Based_Paint_Addendum.pdf		Bozeman	Rachel M.	Jul 29, 16	Assign
<input type="checkbox"/>	Needs Buyer-Addendum_for_Sale_of_2nd_Property...	Imported from Dropbox	South Skyway office	Ramu T.	Aug 4, 16	Assign
<input type="checkbox"/>	Needs Purchase_Contract.pdf	Imported from DocuSign	East River office	Michael A.	Oct 15, 16	Assign

Docs that have been emailed to the maildrop addresses of pre-assigned transactions indicated by the blue assign buttons. Hovering over a blue button will show you which transaction the doc has been pre-assigned to.

Unassigned Docs						
Showing all 29 docs to assign						
Email docs to your Unassigned Docs page: 2530-67829-x@docs.paperlesspipeline.com						
Assign Docs	Bulk Label	Search	Filter	Sort		
Unassigned Doc Name	Email Subject or Source	Location	Added By	Added On	Assign	
<input type="checkbox"/>	Sellers-authorization-to-release-and-advertise_...C...	For 1234 Puppy	Broadway Office	Monta F.	Feb 21, 17	Assign
<input type="checkbox"/>	Purchase_Contract.pdf	Imported from DocuSign	South Skyway office	Ramu T.	Jan 26, 17	Assign
<input type="checkbox"/>	103030202020302.pdf		Downtown Office	Ramu T.	Jan 24, 17	Assign
<input type="checkbox"/>	Sellers_Property_Disclosure.pdf	Fwd: 8300 West Payson	Downtown Office	Ramu T.	Jan 23, 17	Assign
<input type="checkbox"/>	Sellers-authorization-to-release-and-advertise_...C...	For 1234 Whistle	Broadway Office	Monta F.	Jan 19, 17	Assign
<input type="checkbox"/>	Purchase_Contract.pdf	Imported from DocuSign	Downtown Office	Josh J.	Jan 17, 17	Assign
<input type="checkbox"/>	Missin Screen_Shot_2017-01-17_at_9.53.49_AM.png		Downtown Office	Josh J.	Jan 17, 17	Assign
<input type="checkbox"/>	Desert_Lane-RPC-Executed.pdf	For 1234 Common	Downtown Office	Monta F.	Jan 12, 17	Assign
<input type="checkbox"/>	cartoon001.wav		Broadway Office	Jeff A.	Jan 12, 17	Assign

Assign a Document that has been Directly Uploaded to Unassigned Docs

To assign a document that has been directly uploaded to Unassigned docs:

- 1 Click the green [Assign] button.
- 2 Select the desired transaction by clicking the appropriate [Assign] button. If the desired transaction is not shown, use the "Search Transactions" area to search for it.
- 3 Confirm or update the proposed doc name and select the appropriate permission category. The permission category determines who will be able to see the doc, so it's important that you select the right one. You can review the permission details for each category when selecting it. For instance, selecting the 'Listing' category will make this doc visible to only listing agents and office staff.
- 4 Click [Assign Doc]. You'll be taken to the transaction you just specified and see the newly assigned doc listed below.

Assign a Doc that has come in through a Transaction's Maildrop Address

- 1 Click the blue [Assign] button. Notice that since this doc has been pre-assigned to a specific transaction, its transaction will already be selected for you in step one.
- 2 
- 3 Confirm or update the document name, and select an appropriate permission category.
- 4 Click [Assign Doc].

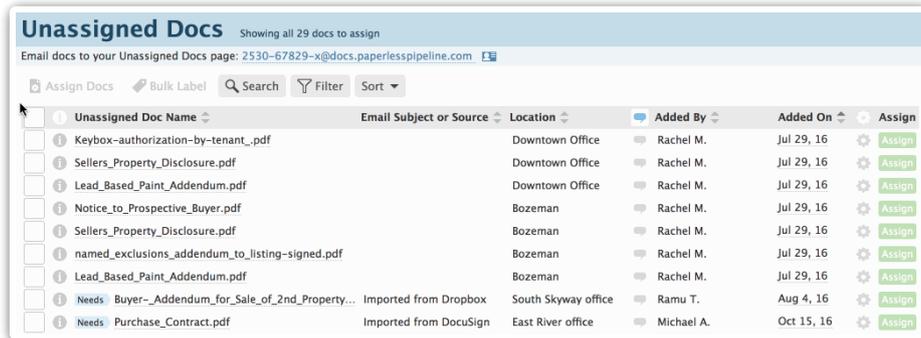
To learn more about maildrop addresses, see: [Understanding Maildrop Addresses](#) →



Assign Several Unassigned Docs at Once

If you need to assign several Unassigned docs to the same transaction, save time by assigning them all at once. To assign several docs simultaneously:

- 1 Check the box next to each doc.
- 2 Click [Assign Docs]. Complete the assignment process the same way as for a single document.



The screenshot shows a web interface titled "Unassigned Docs" with a sub-header "Showing all 29 docs to assign". Below the title is a URL: "Email docs to your Unassigned Docs page: 2530-67829-x@docs.paperlesspipeline.com". The interface includes a toolbar with "Assign Docs", "Bulk Label", "Search", "Filter", and "Sort" options. The main content is a table with the following columns: "Unassigned Doc Name", "Email Subject or Source", "Location", "Added By", "Added On", and "Assign". Each row represents a document with a checkbox in the "Assign" column.

Unassigned Doc Name	Email Subject or Source	Location	Added By	Added On	Assign
<input type="checkbox"/> Keybox-authorization-by-tenant_.pdf		Downtown Office	Rachel M.	Jul 29, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> Sellers_Property_Disclosure.pdf		Downtown Office	Rachel M.	Jul 29, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> Lead_Based_Paint_Addendum.pdf		Downtown Office	Rachel M.	Jul 29, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> Notice_to_Prospective_Buyer.pdf		Bozeman	Rachel M.	Jul 29, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> Sellers_Property_Disclosure.pdf		Bozeman	Rachel M.	Jul 29, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> named_exclusions_addendum_to_listing-signed.pdf		Bozeman	Rachel M.	Jul 29, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> Lead_Based_Paint_Addendum.pdf		Bozeman	Rachel M.	Jul 29, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> Needs_Buyer-Addendum_for_Sale_of_2nd_Property...	Imported from Dropbox	South Skyway office	Ramu T.	Aug 4, 16	<input type="checkbox"/> Assign
<input type="checkbox"/> Needs_Purchase_Contract.pdf	Imported from DocuSign	East River office	Michael A.	Oct 15, 16	<input type="checkbox"/> Assign