

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.

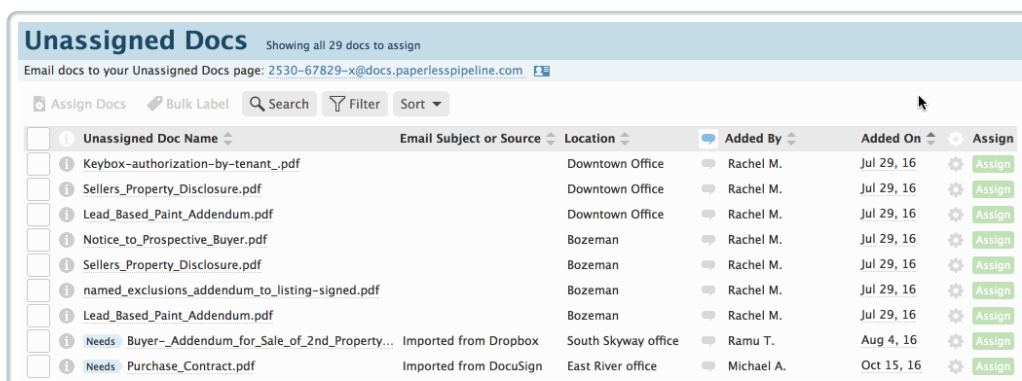
IN THIS ARTICLE

1. [Assign an Unassigned Doc to a Transaction](#)
2. [Assign a Document that has been Directly Uploaded to Unassigned Docs](#)
3. [Assign a Doc that has come in through a Transaction's Maildrop Address](#)
4. [Assign Several Unassigned Docs at Once](#)

 2:00

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.



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

<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 Doc Name	Email Subject or Source	Location	Added By	Added On	Assign
Sellers-authorization-to-release-and-advertise_-C...	For 1234 Puppy	Broadway Office	Monta F.	Feb 21, 17	Assign
Purchase_Contract.pdf	Imported from DocuSign	South Skyway office	Ramu T.	Jan 26, 17	Assign
103030202020302.pdf		Downtown Office	Ramu T.	Jan 24, 17	Assign
Sellers_Property_Disclosure.pdf	Fwd: 8300 West Payson	Downtown Office	Ramu T.	Jan 23, 17	Assign
Sellers-authorization-to-release-and-advertise_-C...	For 1234 Whistle	Broadway Office	Monta F.	Jan 19, 17	Assign
Purchase_Contract.pdf	Imported from DocuSign	Downtown Office	Josh J.	Jan 17, 17	Assign
Missing Screen_Shot_2017-01-17_at_9.53.49_AM.png		Downtown Office	Josh J.	Jan 17, 17	Assign
Desert_Lane-RPC-Executed.pdf	For 1234 Common	Downtown Office	Monta F.	Jan 12, 17	Assign
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 Confirm or update the document name, and select an appropriate permission category.
- 3 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.

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

<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