

# Allow Quick Selection of Categories When Assigning or Uploading Docs

## SUMMARY

This power user feature makes assigning doc categories lightning fast. When bulk uploading, the initial category selected is automatically applied to all docs.

## How to Bulk-select Categories

- 1 Upload your docs to Unassigned docs or directly into a Transaction. Learn more here: [Assign a Doc to a Transaction](#) → and how to upload docs into Paperless Pipeline here: [Upload a Doc](#) →
- 2 Confirm or update the proposed doc name and select an appropriate permission category for the top document. The category selected will automatically apply to all docs.
- 3 If any of the subsequent docs need to have a different permission category, select them individually.
- 4 Click [Upload] or [Assign Docs] to complete the process.

**Step 2** View, name, and categorize your document.

You can preview the documents on this page. Document Name and Permission Category are required fields.

File	Email Subject or Source	Document Name	Permission Category	Reviewed	Entered
Purchase_Contract.pdf		Purchase Contract (#2) ▾	- Choose permission category - ▾	<input type="checkbox"/>	<input type="checkbox"/>
Short_Sale_Addendum...		Short Sale Addendum To Contract ▾	- Choose permission category - ▾	<input type="checkbox"/>	<input type="checkbox"/>
Amendment_to_Contra...		Amendment To Contract ▾	- Choose permission category - ▾	<input type="checkbox"/>	<input type="checkbox"/>
Seller_Financing_Adde...		Seller Financing Addendum ▾	- Choose permission category - ▾	<input type="checkbox"/>	<input type="checkbox"/>
Loan_Assumption_Add...		Loan Assumption Addendum ▾	- Choose permission category - ▾	<input type="checkbox"/>	<input type="checkbox"/>
Earnest_Money_Deposi...		Earnest Money Deposit ▾	- Choose permission category - ▾	<input type="checkbox"/>	<input type="checkbox"/>
Addendum_for_Back-u...		Addendum For Back-Up Contract ▾	- Choose permission category - ▾	<input type="checkbox"/>	<input type="checkbox"/>