Uploading Docs

Unassigned Docs

Unassigned Docs is your personal holding area for documents not yet tied to a transaction.

- Upload docs here when the transaction hasn't started, or when you're holding a file for review.
- Each agent sees only their own uploads.
- Admin staff see all Unassigned Docs in the office.

From here, you can preview, split, assign, or otherwise prepare docs for transactions.

Transaction Docs

Transaction Docs live in the Docs section of a specific transaction and are organized by Permission Category.

Permission Categories control visibility:

- Admins see all docs.
- Listing agents see Listing + Sale.
- Buying agents see Buying + Sale.

Choose the correct category when uploading. For example: selecting Listing makes the doc visible only to listing agents and office staff.

Upload Unassigned Docs

Store Unassigned Docs in Pipeline now and assign them later when the transaction is ready.

Who Can Do This: Admins and agents with *Upload Docs* permission.

To upload Unassigned Docs:

Go to the Unassigned Page

- Click [Unassigned] from the top menu.

Start the Upload

- Click [Upload Docs] in the left menu.

Add Your Documents

- Drag files into the blue upload area, or click to browse and select them from your computer.

- Select a Location if your office has more than one.

Upload to Unassigned

- Click [Upload Docs] to finish. Your files will be added to Unassigned and ready to be assigned.

Upload Docs to a Transaction

Easily add documents directly to a transaction so they're organized, searchable, and accessible to the right people.

Who Can Do This: Admins and agents with *Upload Docs* and *Assign Docs* permission.

To upload docs to a transaction:

Go to the Transaction

- Open the transaction where you need to take action.

Start the Upload

- Click [Upload Docs] in the left menu, or use the *Upload Docs* option from the blue action menu.

Add Your Documents

- Drag files into the blue upload area, or click to browse and select them from your computer.

Name Docs

- Type the *Doc Name*.
- Start typing the name, and select it from your company's list of Standardized Doc Names. Your company's preferred name and settings will be applied automatically.
- If no Standardized Doc Name exists, type the complete doc name.

Set Permission Category

- Choose the *Permission Category* to set which participants on the transaction can view the document.

- If the *Doc Name* has a default Permission Category, it will be pre-selected when you choose it.

Save Docs

- Click [Upload Docs] to finish. As each file uploads, its row will turn green with a checkmark. When the upload is complete, you'll be redirected to the transaction, and the new docs will be highlighted in the *Docs* section.

Maildropping Docs

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Learn how to Maildrop Docs