# Assigning Docs

You can assign documents to transactions from two places:

- Unassigned Page
- Within a Transaction

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## Assign a Doc

Assign a single document to a transaction.

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

To assign a doc to transactions from the Unassigned Page

**Go to the Unassigned Page**

- Click [Unassigned] from the top menu.

**Find the Doc**

- Locate the doc you want to assign. Use search or sort to narrow your results.

**Start the Assignment Process**

- Click [Assign] to the right of the doc.

**Choose a Transaction**

- Click [Assign] next to the correct transaction if the doc is not already pre-assigned to a transaction.
- Optionally, if the transaction does not exist yet, click [Add Transaction] to create it.

**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.

**Assign**

- Click [Assign Doc]. When the upload is complete, you'll be redirected to the transaction, and the new docs will be highlighted in the Docs section.

## Bulk Assign Docs

Assign multiple documents to a transaction at once.

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

To assign a doc to transactions from the Unassigned Page

**Go to the Unassigned Page**

- Click [Unassigned] from the top menu.

**Select the Docs**

- Check the box next to each doc.
- Check the box in the header row to select all docs.

**Start the Bulk Assignment Process**

- Click [Bulk] from the menu at the top of the page, then select [Bulk Assign].

**Choose a Transaction**

- Click [Assign] next to the correct transaction if the docs are not already pre-assigned to a transaction.
- Optionally, if the transaction does not exist yet, click [Add Transaction] to create it.

**Name Docs**

- Type each *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 each *Permission Category* to set which participants on the transaction can view the document.
- If a *Doc Name* has a default Permission Category, it will be pre-selected when you choose it.

**Assign**

- Click [Assign Docs]. When the upload is complete, you'll be redirected to the transaction, and the new docs will be highlighted in the Docs section.

## Assign Docs via Transactions

Assign documents directly within a transaction.

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

To assign a doc to transactions from the Unassigned Page

**Go to the Transaction**

- Open the transaction where you need to take action.

**Start the Assignment Process**

- Click [Assign Docs] from the left menu.

**Continue Assignment**

- Follow the steps for Assign a Doc or Bulk Assign Docs as needed.