

Doc Assignment FAQ

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Assigning sets a doc's transaction, its name, and its permission category — and it can be undone by unassigning. Answers to the common questions about missing assign buttons, moving docs between transactions, and reviewed docs.

Why can't I see an Assign button?

You don't have **Assign docs to transactions** permission. It's separate from **Upload Docs**, so you can be able to add docs and not be able to file them. Ask your office admin to grant it, or to assign the docs for you.

How do I move a doc to a different transaction?

Unassign it, then assign it again. Open the transaction holding the doc, click the [Gear] beside it, click [Unassign Doc], then assign it from the *Unassigned* page to the right transaction. Reassigning beats deleting and re-uploading — the file and its record stay intact.

Can I move a doc that's already been reviewed?

Not as an agent. Once an admin marks a doc reviewed, agents lose the ability to move or change it. Ask an admin to unassign it for you.

Why do I have to pick a permission category every time?

Because it decides who can open the doc. Pipeline won't place a doc on a transaction without that decision being made — which is also why emailed docs stop in Unassigned, since a category can't be chosen over email.

Can I change a doc's permission category after assigning it?

Yes. The category is set at assignment but isn't locked in afterwards. Changing it later is a document permissions job rather than an assignment one.

What happens to the doc name I type?

It becomes the doc's name on the transaction. Pipeline proposes one and you confirm or replace it — your chance to turn a scanner filename into something readable.

Where can I see what was assigned and by whom?

Assignment History, from the left menu of the *Unassigned* page. It records what was filed, where it went, and who did it.

Learn More

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See [Doc Assignment](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
