Doc Assignment

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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.

Introduction

Until somebody says which deal it belongs to, a document that arrives is just a file that arrived. Assigning is the step that changes that, and it does three jobs at once: it puts the doc where the deal lives, gives it a name people recognize, and settles who's allowed to open it.

That third job is why the step exists at all. Nothing goes onto a transaction until a person has decided who should see it, and that isn't a call an email can make or a filename can imply. So every doc that arrives by email waits in the queue for somebody to make it, which is the reason there's a queue in the first place rather than everything landing on transactions by itself.

You end up with paperwork that is findable, named the way your office names things, and visible to the right people from the moment it lands. You can also take an assignment back, which is worth knowing before you panic about a misfile. A doc on the wrong transaction doesn't have to be deleted, downloaded, and uploaded again: send it back to the queue and file it a second time, name intact.

How It Works

Assigning Settles Three Things at Once

Which transaction the doc lives on, the name people will read, and the permission category that decides who can open it. The category is why the queue exists: nothing goes onto a transaction until a person has decided who should see it, and a doc filed under a listing-side category is visible to listing agents and office staff and to nobody else.

Green and Blue Buttons Start You in Different Places

A blue assign button means the doc was emailed to a transaction's address and already knows where it's going — Pipeline picks that transaction for you, and you go straight to naming and categorising. A green button means you pick the transaction yourself, searching for it if it isn't on screen.

Pipeline Logs Every Assignment

Pipeline logs each assignment with its doc, its transaction, and the person who filed it — which is how a doc that went to the wrong place gets found later.

Assign a Doc to a Transaction

Put a doc from the queue onto its transaction, naming it and choosing who can see it as you go. A doc emailed to a transaction's address arrives with that transaction already selected, so you'll skip straight to step 3.

Who Can Do This: Anyone with **Assign docs to transactions** permission in the relevant location. It's a separate permission from **Upload Docs**, so someone can put docs into the queue without being able to file them out of it.

To assign a doc to a transaction:

1. Click [Unassigned] from the top menu.
2. Click the [Assign] button to the right of the doc.
3. Choose the transaction by clicking its [Assign] button. If it isn't listed, search for it.
4. Confirm or update the proposed doc name.
5. Choose a permission category. This decides who can see the doc, so read what each one covers before you pick.
6. Click [Assign Doc].

You'll land on the transaction with the newly assigned doc listed under the category you chose.

Unassign a Doc From a Transaction

Send a doc back to the queue so it can be filed somewhere else — the fix for a doc on the wrong transaction.

Who Can Do This: The person who added the doc, until an admin marks it reviewed. After that, an admin.

To unassign a doc from a transaction:

1. Open the transaction holding the doc.
2. Click the [Gear] to the right of the doc.
3. Click [Unassign Doc].

The doc returns to the *Unassigned* page, ready to be assigned to the right transaction. Nothing about the file changes.

Work Out Which Category to Pick

Every doc on a transaction carries one, and it's the decision on that screen you can't guess your way through. File something under Buyer and the listing agent genuinely can't open it, however obvious it looks that they should be able to.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

Frequently Asked Questions

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.