

Doc Source

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Where did this doc come from? Every row in Unassigned carries its own trail — who added it, and the email subject or source it arrived with.

Introduction

A scanned PDF called *Scan_0043.pdf* tells you nothing. What tells you something is how it got here: the subject line of the email it rode in on, and the name of the person whose address it was sent to.

Pipeline captures both on the way in, with nothing to tag and no field to fill, and shows them right in the queue. That's what turns a stack of anonymous filenames into a pile you can actually work down. The subject line is the useful half, because whatever the sender typed travels with the doc and becomes something you can sort on. Offices that ask their agents to put the property address in the subject get a queue that groups itself by deal.

The name half surprises people, because it follows the route a doc came in through rather than whoever hit send. That catches somebody out in most offices at least once, and it isn't a fault in the record. What the pair of them gives you is a queue you can read at a glance, and a way to walk a doc that ended up somewhere strange back to where it started.

How It Works

Pipeline captures the trail on the way in and shows it on the way out — no tagging, no filling anything in.

What the Source Column Tells You

Every row on the *Unassigned* page carries this column. For a doc that arrived by email it holds the subject line the sender wrote. For a doc that arrived some other way it names that route instead. It's the column people rely on when the filename is useless.

Added By Is About the Address, Not the Sender

This is the part that catches people out. **Added by** records the person who owns the route the doc came through — the profile that uploaded it, or the owner of the maildrop address it was emailed to. Pipeline doesn't read it from the sender's email address.

So if one person emails docs to somebody else's maildrop address, that somebody else is recorded as having added them. It looks like a mistake and it isn't: the address *is* the identity, which is exactly why each user gets their own and why sharing one blurs the record.

The Subject Line Is Yours to Use

Because the subject travels with the doc, what the sender types in it becomes searchable, sortable context on arrival. Offices that ask agents to put the property address in the subject line get a queue that groups itself by property — the docs for one deal sit together whichever order they came in.

Docs That Come Back From Signing

A completed signature request returns its document to the *Unassigned* page rather than to a transaction. Those arrive without an email subject, and the source column is what tells you the doc came back from signing rather than from somebody's scanner.

What It Doesn't Record

Source is about arrival, not about everything that happened afterwards. Once a doc is on a transaction, the transaction's own history is where the rest of the story lives — who assigned it, who reviewed it, who changed it.

Check Where a Doc Came From

Read a doc's origin off the queue without opening it.

Who Can Do This: Anyone who can see the *Unassigned* page.

To check where a doc came from:

1. Click [Unassigned] from the top menu.
2. Find the doc in the list.
3. Read the **Email Subject** or **Source** column for the subject line or route it arrived by.
4. Read **Added by** for the person whose profile or maildrop address it came through.

Between the two you can usually tell which transaction a doc belongs to without opening it.

Doc Source FAQ

Source is captured on arrival and shown in the queue — the email subject a doc came in with, and the person whose route it travelled. Answers to the common questions about wrong names on the **Added by** column and using subject lines to sort your queue.

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See [Doc Source FAQ](#)
