Unassigned Docs List

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Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

Introduction

Docs that arrive without a destination have to wait somewhere. Unassigned is that somewhere, and it's a workqueue rather than a folder: everything on this page is on its way to a transaction, and nothing is meant to stay.

A doc lands here the moment it enters Pipeline with no transaction attached, and it sits until somebody decides where it belongs. For an agent that's usually a short stop, gone by the time they look again. For whoever files paperwork it's the daily list, and the list does most of the explaining: each row tells you what the doc is, who put it there, and which office it came in through, so you can work down the queue without opening every file.

The queue is also the answer to the most common false alarm in the product. A doc that seems to have vanished after an agent emailed it in has usually done nothing of the kind. It's sitting right here, waiting on a person. What the page isn't is storage: there's nowhere to park a buyer's rep agreement that has no deal behind it yet, because everything here is on its way somewhere.

How It Works

What Lands Here

Five things: docs emailed to any maildrop address, docs uploaded from the *Unassigned* page rather than from inside a transaction, docs imported from Dropbox, docs imported from your DocuSign Inbox, and docs returned from a completed signature request. A doc uploaded from inside a transaction skips the queue — it's already filed.

Telling One Doc From Another

Each row carries the doc's name, who added it, its location, and an **Email Subject or Source** column. That last one is what people lean on hardest when a filename says nothing useful: an emailed doc arrives carrying the sender's address and the subject line it was sent with, and a doc that came in some other way names its route instead, such as a completed signature request. Location matters too — a doc carries the location it arrived in, and you see the queue for the locations you have access to.

Added by names whoever owns the route a doc came through: the profile that uploaded it, or the person whose maildrop address it was emailed *to*. Pipeline doesn't read it from the sender's address, which is why each user gets a maildrop address of their own.

How a Doc Leaves

Assigned to a transaction, or deleted. Nothing expires on its own, and both routes are recorded and recoverable, which is the answer when a doc looks like it vanished. Unassigning gives a doc back to the queue rather than back to you: it returns carrying its transaction's location. When you're rejecting a doc rather than re-filing it, delete it instead — deleted docs can still be recovered.

Open the Unassigned Page

The queue is one click from anywhere in Pipeline.

Who Can Do This: Anyone with **Upload Docs** permission in at least one location.

To open the Unassigned page:

1. Click [Unassigned] from the top menu.

You'll see every doc waiting to be filed, along with your own maildrop address at the top of the page.

See Which Transaction a Doc Is Already Tied To

A doc emailed to a transaction's maildrop address arrives already knowing where it belongs — hovering tells you which one before you commit to anything.

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

To see which transaction a doc is already tied to:

1. Click [Unassigned] from the top menu.
2. Hold your cursor over the doc's blue [Assign] button.

The transaction it's pre-assigned to appears. A green button has no transaction behind it — that one's yours to choose.

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.

Frequently Asked Questions

How long does a doc stay in Unassigned?

As long as you leave it there. Nothing expires or clears itself out — a doc waits until someone assigns it to a

transaction or deletes it.

Why can an agent see a doc in Unassigned that an admin can't?

The queue is scoped by location. Docs carry the location of the address or upload they came in through, and you only see docs in locations you have access to. A doc emailed to a location-specific address sits in that office's queue.

Can agents see each other's unassigned docs?

No. Agents see the docs they uploaded, up until those docs are moved onto a transaction. Admins see what their permissions cover across the locations they work in.

Why can someone else see a doc I unassigned?

Unassigning gives the doc back to the queue, not back to you. A doc that was on a transaction keeps that transaction's location when it returns, so anyone with **View all transactions** and **Assign docs** in that location can see it. If you're rejecting a doc rather than re-filing it, delete it instead — deleted docs can still be recovered.

What does an admin need to work the Unassigned queue?

Both View all transactions and Assign docs, in each location they're covering. One without the other leaves gaps, which is the usual explanation when an admin can see part of the pile and not the rest.

Can I stop agents from deleting docs in Unassigned?

No — there's no permission setting for it. Agents can manage the docs they uploaded, including deleting them, while those docs are still unassigned and not yet reviewed. Deleted docs go to the deleted docs bin and can be recovered.