Unassigned Docs Search

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Fifty rows in the queue and you want one of them. The Unassigned page has its own search field and sortable columns, and both behave in ways worth knowing before you decide a doc isn't there.

Introduction

Most days you don't search the queue, you clear it. The moment it runs long, though, or somebody asks where a particular disclosure went, you want to land on one row without scrolling past forty others.

Two tools do that work, and they're good at different jobs. Search pulls up a doc by name, which is the fast route when you know what the document is called. Sorting re-orders the whole queue, which is the better one when you're after a group rather than a single file: every page that came in for the same property, or everything one person sent this morning. Knowing which to reach for is most of the skill.

The payoff is a long queue that behaves like a short one. The reason it's worth knowing how each tool matches is the conversation waiting at the other end of a failed search. A doc that doesn't come up has usually not gone missing, it just arrived named something other than what you typed, so an empty result is a question rather than an answer.

How It Works

Search narrows the list; sorting re-orders it. Neither changes what's in the queue.

Search Matches the Doc's Name

The search field reads the doc's filename and matches what you type as one continuous string, so the shortest distinctive word finds more than a phrase does — `gold` turns up `Gold_Dust.pdf`. It covers this queue only: once a doc is assigned it leaves the list, and Pipeline's main search is what finds it from there.

Sorting Re-Orders the Whole Queue

Click a column heading and the list re-orders straight away, for that visit — there's no saved or per-account default sort. Sorting by **Email Subject or Source** is the one that earns its keep: when people put the property address in the subject line, everything for that address stacks together and works through in one pass.

Show or Hide Columns

The **Columns** menu shows or hides four columns: **Email Subject or Source**, **Location**, **Added By** and **Added On**. You can't add a column that isn't on that list, such as a transaction's status in place of *Location*. Doc labels or a subject-line convention carry routing information the columns don't, and hovering over a doc's assign button shows the property it's tied to. A narrow browser window drops the less-used columns; maximize it and they come back.

Search the Unassigned List

Search the queue instead of scrolling it when you know roughly what the doc is called.

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

To search the Unassigned list:

1. Click [Unassigned] from the top menu.
2. Type part of the doc's name into the search field. Use one distinctive word rather than a phrase — spaces and underscores aren't interchangeable.
3. If nothing comes back, clear any location filter and search again.

Matching docs stay on the list and the rest drop away. If the doc still isn't there, it's already been assigned or deleted.

Sort the Unassigned List

Re-order the queue to group related docs together while you work through them.

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

To sort the Unassigned list:

1. Click [Unassigned] from the top menu.
2. Click the heading of the column you want to sort by.

The list re-orders straight away. It's a per-visit choice — leave the page and it goes back to the default order.

Find a Doc That's Already Left the Queue

A search that comes back empty often means somebody filed the doc while you were looking for it. At that point the question changes: not where is it, but who put it somewhere and where did it go.

Every doc filed out of Unassigned leaves a record — search it by doc, by transaction, or by the person who did the filing.

See Assignment History

Frequently Asked Questions

Why doesn't the search find a doc I can see in the queue?

It's almost always the punctuation. The search matches your text as one continuous string inside the filename, so `Gold Dust` misses a file named `Gold_Dust.pdf` — the space isn't in the name. Search a single word instead and it comes straight up.

What does the Unassigned search actually look at?

The doc's name. If you're going by where a doc came from rather than what it's called, read the**Email Subject or Source** column, or sort by it.

I searched and got nothing. Is the doc gone?

Not necessarily — check for an active location filter first. If you're narrowed to one office and the doc arrived in another, search comes back empty while the doc sits in the queue. Clear the filter and search again before concluding anything.

Can I set a default sort order for the Unassigned page?

No. You can re-sort by clicking a column heading, but the choice lasts for that visit only. A saved default sort has been requested and isn't available.

How do I group all the docs for one property together?

Sort by Email Subject or Source. Ask people to put the property address in the subject line when they email docs in, and everything for that address stacks together — which makes a batch quick to work through and easy to find later.

Can I change which columns appear on the Unassigned page?

You can show or hide some of them. The **Columns** menu turns **Email Subject or Source**, **Location**, **Added By** and **Added On** on or off. There's no way to add one that isn't on that list, such as a transaction's status in place of *Location*. Doc labels and a subject-line convention are the practical substitutes, and hovering over a doc's assign button shows the property it's tied to.