Uploading Docs

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Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

Introduction

Sometimes the paperwork is already sitting on your computer and there's nothing to forward. Uploading is the direct route in: open the upload screen, drag a stack over or pick the files by hand, and they're in.

Where they land is the one decision you make. Upload from inside a transaction and the docs attach to it right away, which is what you want when you already know where they belong. Upload from the *Unassigned Docs* page and they wait in the queue until somebody files them, which is the better move when the transaction doesn't exist yet, or when you aren't the person who decides where things go.

Paperwork lands in the system in about the time it takes to drag it over, with no forwarding step and nothing to wait on. Big sets go up in batches rather than in one pass, so a fat closing packet takes a couple of goes. That's a limit on how many files move at once, not on how many a transaction can hold, which is the thing most people assume the first time they meet it.

How It Works

One upload screen, two destinations, and a few limits worth knowing before you start.

Two Places a Doc Can Land

Uploading from a transaction puts the doc on that transaction immediately, and you pick its permission category as part of the upload. Uploading from the *Unassigned* page puts the doc in the holding queue instead, where it stays until it's assigned to a transaction.

Drag Over or Click to Choose

The upload screen accepts either. Drag files onto the **Drag docs here** area from a second window, or click **Click to choose docs from your computer** and pick them from a file browser. Pipeline lists what you selected so you can check it before you commit.

Twenty-Five Docs at a Time

A single upload takes up to 25 docs. There's no cap on how many docs a transaction can hold in total — larger batches go up 25 at a time. The per-upload limit is there to keep uploads fast and reliable.

Uploading to Unassigned Asks for a Location

When you upload into Unassigned, you choose the location the docs belong to. That's how the queue stays organized for accounts running more than one office — a doc sits in the queue for the location you uploaded it to.

What Pipeline Accepts

PDFs are the safe answer everywhere. Some offices turn on a setting that accepts PDFs only, and in those accounts Pipeline rejects any other file type on the way in. Ask your office admin if you're not sure how yours is set.

Who Can Upload

The **Upload Docs** permission controls uploading, and you grant it per location — not per transaction. If you can't see an upload button on a transaction, you don't have **Upload Docs** in that transaction's location, even if you're an agent on the deal.

Upload Docs to a Transaction

Add docs straight to a transaction, naming each one and choosing who can see it as you go.

Who Can Do This: Anyone with **Upload Docs** permission in the transaction's location.

To upload docs to a transaction:

1. Open the transaction, then click [Upload Docs] from the left menu.
2. Drag your files onto the **Drag docs here** area, or click **Click to choose docs from your computer** and select them. Pipeline lists what you picked.
3. Confirm each doc's name.
4. Choose a permission category for each doc. This decides who can see it, and you can review what each category covers as you select it.
5. Click [Upload Docs].

The docs appear in the transaction's *Documents* section, grouped under the permission category you chose.

Upload Docs to Unassigned

Put docs into the holding queue when you don't know the transaction yet, or when filing them is someone else's job.

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

To upload docs to Unassigned:

1. Click [Unassigned] from the top menu.
2. Click [Upload Docs] from the left menu.
3. Drag your files onto the **Drag docs here** area, or click **Click to choose docs from your computer** and select them.
4. Select the location the docs belong to.
5. Click [Upload Docs].

Your docs show up on the *Unassigned* page, ready to be assigned to a transaction.

Frequently Asked Questions

How many documents can I upload at once?

Up to 25 at a time. There's no limit on how many docs a transaction can hold in total, so larger batches just go up in rounds of 25. The per-upload limit is there to keep uploads fast and reliable.

What file types can I upload?

PDFs work everywhere. Some offices turn on a setting that accepts PDFs only, and in those accounts any other file type is rejected on the way in. If you're not sure how your account is set, ask your office admin.

Why don't I see an Upload Docs button on a transaction?

You don't have Upload Docs permission in that transaction's location. The permission is granted per location, not per transaction — being added to a deal as an agent doesn't grant it. Ask your office admin to add it for the location the transaction sits in.

Why did my upload land in Unassigned instead of on the transaction?

Either you started from the Unassigned page, or you don't have Assign docs to transactions permission. Without that second permission the upload still succeeds — the docs just wait in Unassigned for an admin to file them.

Is uploading better than emailing docs in?

Uploading is the more direct route. It's the only way to put a doc straight onto a transaction; emailed docs always stop in Unassigned first. Beyond that, pick whichever fits how you work.

Can I upload a document to more than one transaction at a time?

No — one upload, one destination. If the same paperwork belongs on two transactions, upload it to each one.