Work the Unassigned Queue Fast

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Fifty rows of *scan001.pdf* is a filing problem you can fix upstream. Two habits turn the queue from a puzzle into a list you work in minutes.

Introduction

Unassigned is where every emailed and uploaded document waits for someone to say which deal it belongs to. For an agent it's a moment; for whoever files paperwork, it's the day.

What makes it slow is almost never the assigning — it's the identifying. A scanner names files after itself, so a queue of forty documents can be forty rows that tell you nothing about which property they're for, and you end up opening each one to find out.

Two changes fix most of that. One happens before the docs arrive, at the sending end. The other is about where you stand when you file: you don't have to leave the transaction you're already working in.

When to Use This

- Your Unassigned queue is long and the doc names tell you nothing.
- You're opening documents one at a time just to work out which transaction they belong to.
- Several documents for the same property arrive together and you want to file them in one go.
- You're working inside a transaction and have to leave it every time you need to assign something.
- Agents keep asking you to find the doc they just sent in.

1. Get the Property Address Into the Email Subject

This is the one change that pays for itself in a week. Tell your agents to put the property address in the**subject line** when they email documents in — that's it, no other change to how they send.

Unassigned shows the email subject and the sender on every row that arrived by mail, so an address in the subject means the row identifies itself. It rescues generically named scans without anyone renaming anything, and it gives you the grouping in the next step for free.

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.

See Unassigned Docs List

2. Sort by Email Subject and File in Batches

With addresses in the subjects, sort the queue by Email Subject and every document for one property lines up together. Now you're filing a property at a time instead of a document at a time — check the ones that belong to the same deal and assign them together.

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3. Assign Without Leaving the Transaction You're In

When you're already inside a file and you know its documents are sitting in the queue, don't go out to Unassigned and come back. Use **Assign Docs** on the transaction's left menu — it shows you the unassigned documents and files them onto the transaction you're already in.

This is the move for anyone who works transaction by transaction rather than queue by queue: pull the paperwork to the deal instead of pushing each document out to find it.

4. Send Documents Straight at Their Transaction

Every transaction gives each person a maildrop address of their own for it. Documents emailed there arrive already pointed at that transaction — you'll still see them in the queue, because a permission category can't be chosen over email, but the transaction is already selected and assigning is two clicks instead of a search.

Send or forward a message to the transaction it belongs to. Pipeline keeps the message on the file and sends its docs to Unassigned, already pointed at that transaction.

See Your Transaction Maildrop Address



The Assign button's color tells you which kind of row you're looking at: blue means the document already knows its transaction, green means you'll pick one.

5. Find One Document When the Queue Is Long

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.

See Unassigned Docs Search