Doc Merge FAQ

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Merging combines the PDFs on one transaction into a single named doc, in the order you set. Answers to the common questions about what can merge, what happens to the originals, and who can do it.

Can I merge files that aren't PDFs?

No — merging is PDF-only. PDFs have fixed formatting rules that make a predictable merge possible; other formats don't. Convert the file to PDF and re-upload it, and it'll merge like anything else.

Why is [Merge Docs] unavailable, or why does it say no documents are available to merge?

There aren't two PDFs you're able to manage on that transaction. The tool needs more than one. For agents, only docs they uploaded themselves count — and only until an admin assigns them to the transaction or marks them Reviewed. If you've already ticked every available PDF, that's the same message.

Will merging delete my original documents?

Only if you ask it to. [Delete Docs After Merge] is a checkbox, and it's off unless you check it. Leaving it off while you confirm the merged file looks right is the safer habit.

I checked delete-after-merge and the originals are still there. Why?

Docs already marked Reviewed or Entered aren't deleted. The merge only clears out docs that haven't been reviewed or entered yet. An admin can remove the rest.

Can I choose what order the docs merge in?

Yes — drag them. After you select the docs, drag them into the sequence you want and they'll be stitched together in exactly that order.

Can I merge documents from two different transactions?

No — merging works within one transaction. Move the docs onto a single transaction first, and they'll merge from there.

Can I undo a merge?

Break the merged doc apart. The break-apart tool splits it back into separate docs, and you can leave out any page you don't want along the way. If you deleted the originals during the merge, they're recoverable from the transaction's deleted docs.

Why can't an agent merge docs a coordinator or an admin uploaded?

By design, agents manage only their own docs. Once a doc was uploaded by someone else, assigned by an admin, or marked Reviewed, merging it is an admin action. Agents can email an admin from the transaction to ask for it.

Why do I get an old PDF version error when merging?

One of the source PDFs isn't standard enough to rebuild. Reprinting that doc to a new PDF and re-uploading it usually clears it.

The full walkthrough, including the other reasons a merge stops, is here:

Break apart and merge both rebuild the PDF from scratch, so a file that isn't quite standard stops them cold. Here's how to tell which kind of problem you have, and clear it.

See Why Do I Get an Error Breaking Apart or Merging a Doc?

Learn More

Combine several PDFs on a transaction into one clean document, named the way your office names things.

See Doc Merge

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.