

Doc Merge

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

Introduction

A closing packet that arrived in six pieces stays in six pieces until somebody does something about it. Sending a client six attachments, or opening six documents to print six documents, is the version of this everyone has done at least once.

Merging combines PDFs already on a transaction into one document, in the order you drag them into, under a name you choose rather than one the software invents for you. It's also the tool that puts a doc back together after Break Apart has taken a page out, which is how a bad page in the middle of a filed contract gets replaced without rescanning the whole thing.

Six attachments become one. One file to send, one to print, and a contract that reads together with its addenda instead of beside them. The pieces you merged stay exactly where they were, so trying it costs nothing. If the order comes out wrong, merge them again and delete the version you don't want.

How It Works

What You Can Merge

Two or more PDFs that are already on the same transaction. [Merge Docs] becomes active once the transaction holds more than one PDF you're able to manage.

PDFs Only

PDFs have fixed, predictable formatting rules that make a reliable merge possible, and other formats don't. Converting a file to PDF before uploading keeps it mergeable.

What Happens to the Originals

The merge creates a new doc and leaves the source docs where they are, unless you choose to delete them as part of the merge. Leaving them is the safer habit while you check the result.

Merge Docs on a Transaction

Combine two or more of a transaction's PDFs into a single doc, named and ordered the way you want it.

Who Can Do This: Admins, for any docs on the transaction. Agents, for docs they uploaded themselves — until an admin assigns those docs to the transaction or marks them Reviewed.

To merge docs on a transaction:

1. Open the transaction and scroll down to the toolbar above its docs.
2. Click [Merge Docs]. The merge tool expands on the page.
3. Name the merged doc — type a name, or click the [Arrow] to pick from your office's standard doc names and names you've used before.
4. Check the box beside each PDF you want to include, expanding or collapsing the doc sections as you need to.
5. Drag the selected docs into the order you want them to appear in.
6. Optionally, check [Delete Docs After Merge] to remove the originals once the merge succeeds.
7. Click [Merge Docs].

The merged doc appears in the transaction's docs list under the name you gave it, and behaves like any other doc from there.

Doc Merge FAQ

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. See [Doc Merge FAQ](#).
