Doc Merge

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Combine several PDFs into one clean document, named the way your office names things, whether they're already on a transaction or still waiting in *Unassigned*.

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 into one document, in the order you drag them into, under a name you choose rather than one the software invents for you. You can merge docs already filed on a transaction, or merge the pieces of a packet on the *Unassigned* page before any of them is assigned. 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, one to assign, and a contract that reads together with its addenda instead of beside them. The pieces you merged stay where they were unless you choose to delete them, 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

Where You Can Merge

On a transaction, or on the *Unassigned* page. On a transaction, you merge two or more PDFs already filed there. On *Unassigned*, you merge PDFs still waiting in the queue, and the merged doc stays unassigned, so there's no round trip onto a transaction and back.

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 under the name you give it 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, 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 *Quick Actions* 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.

Merge Docs on the Unassigned Page

Combine two or more unassigned docs into a single file, before any of them is assigned to a transaction.

Who Can Do This: Admins, for the docs in the queue of each location where they hold both **View all transactions** and **Assign docs**. Agents, for docs they uploaded, until those docs move onto a transaction.

To merge docs on the Unassigned page:

1. Click [Unassigned] from the top menu.
2. Check the boxes next to the docs you want to combine.
3. Click [Bulk], then [Bulk Merge]. The *Bulk Merge Docs* window opens with the docs you checked.
4. Under **Docs to be merged**, drag the docs into the order you want them stitched together in.
5. Type a **Merged doc name**.
6. Choose the **Location** the merged doc belongs to.
7. Optionally, check [Delete docs after merge] to remove the originals once the merge succeeds.
8. Click [Merge 2 Docs]. The number on the button matches how many docs you checked.

The merged doc appears in *Unassigned* as a single file, ready to assign to a transaction or to run through Pipeline AI.

Put the Merged Packet on a Transaction

Merging on *Unassigned* changes what's in the queue, not where it sits. Five rows became one, and that one is still waiting on the same decision the five were.

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction,

with the right name and the right permission category.

See Doc Assignment

Run a Merged Packet Through Pipeline AI

Pipeline AI reads a whole document in a single run, so a packet you merged first goes through as one run instead of one per piece. Merging itself isn't an AI action and never counts as a run.

Upload a signed contract and a filled-in transaction comes back — *AI Create* does the typing, so you review what Pipeline pulled, add what's missing, and save.

See Pipeline AI Create

Frequently Asked Questions

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.

Can I merge documents before assigning them to a transaction?

Yes. Select the docs on the *Unassigned* page, click [Bulk], then [Bulk Merge]. Nothing has to be assigned first, and the merged doc stays in the queue until you assign it.

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 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.

Can I choose what order the docs merge in?

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

Will merging delete my original documents?

Only if you ask it to. On a transaction, [Delete Docs After Merge] is a checkbox, and it's off unless you check it. On *Unassigned*, the *Bulk Merge Docs* window has the same choice: [Delete docs after merge]. Leaving it off while you confirm the merged file looks right is the safer habit.

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

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.