

Merge on Unassigned FAQ

Last Modified on 09/04/2026 11:20 am EDT

Merging on *Unassigned* combines several arriving docs into one file before any of them is assigned. Answers to the common questions about when to merge, what it costs, and how it works alongside Pipeline AI.

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 — this is the round trip it removes.

Does merging use up an AI run?

No. Merging is an ordinary Pipeline document action and costs nothing. Pipeline AI only bills when someone chooses to run AI Create or AI Update; it never reads a doc, or charges for one, on its own.

Why would I merge before running AI Create?

Because one file is one run. Pipeline AI reads a whole document and pulls transaction details from whichever pages carry them, so a contract with its riders and disclosures is a single run. Merge the pieces of a packet first and you pay for one run instead of one per file.

Do I have to merge, or can I add the other documents afterward?

You don't have to. Run the main contract through AI Create, then add the rest with AI Update. That's a perfectly good route — it just costs a run each time, where a merged packet costs one.

Can I merge documents that are already on a transaction?

Yes, with the transaction's own merge tool. This one is for docs still sitting in *Unassigned*; once docs are filed on a transaction, you merge them there instead.

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

See [Doc Merge](#)

Can I break a merged doc back apart?

Yes. Break Apart works on unassigned docs as well as on transaction docs, so a merge you'd rather undo can be split back into pieces from either place.

One scanned stack, many documents. Break a doc apart to split it into separate docs, pull out the pages you need, and name each one as you go.

See [Doc Break Apart](#)

What kinds of files can be merged?

PDFs only. Other formats don't share the fixed layout rules a reliable merge depends on. Converting a file to PDF before uploading keeps it mergeable.

What happens to the original documents?

They stay, unless you say otherwise. The merge window offers to delete the source docs once the merge succeeds. Leaving that off is the safer habit while you check the result.

Learn More

Paperwork for one deal rarely arrives in one file. Combine the pieces into a single document right on the *Unassigned* page, before any of it is assigned and before you hand it to AI.

See [Merge on Unassigned](#)

Still Have Questions?

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