

Merge on Unassigned

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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.

Introduction

A listing packet turns up as five separate emails: the MLS sheet, the agreement, two addenda, a disclosure. Each one lands in *Unassigned* as its own doc, waiting to be filed.

Merging on *Unassigned* lets you put them back together first. Check the docs that belong to the same deal, merge them into one file, and you're left with a single document to assign — or a single document to run through Pipeline AI.

That second part is why this sits with Pipeline AI. An AI run reads one file, so a packet you've already merged is one run instead of one run per piece.

How It Works

What You Can Merge

Any PDFs sitting in *Unassigned*, in any combination. They stay unassigned throughout — no round trip onto a transaction and back, which is the step this removes. Other formats can't be merged, so converting a file to PDF before uploading keeps it mergeable.

What You Get Back

One file in *Unassigned*, under the name and location you give it, with the pages in the order you dragged them into. The originals stay in the queue unless you ask for them to be deleted — leaving that off is the safer habit while you check the result.

What It Means for an AI Run

Pipeline AI reads a whole document and pulls transaction details from whichever pages carry them, so a merged packet is one run instead of one per file, however many pages it holds. Merging itself is an ordinary document action — Pipeline AI only bills when someone runs AI Create or AI Update.

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: You can merge docs you can see in the queue. Agents see the docs they added themselves, until those docs move onto a transaction. An admin sees the queue for each location where

they hold both **View all transactions** and **Assign docs**.

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].
4. Name the merged doc and choose the location it belongs to.
5. Drag the docs into the order you want them stitched together in.
6. Optionally, choose to delete the original docs once the merge succeeds.
7. Confirm the merge.

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

Put the Merged Packet on a Transaction

Merging changes what's in the queue, not where it sits. Five rows became one, and that one is still in *Unassigned* 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](#)

Merge on Unassigned FAQ

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.

See [Merge on Unassigned FAQ](#)
