

AI Assign

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Open Unassigned to docs AI Assign has already named, each one ready for you to assign.

Introduction

Pipeline AI helps you assign the docs that land in *Unassigned*. A doc can arrive with a filename that says little: a scanner's number, a phone photo's date, whatever the sender called it. As each one arrives, Pipeline reads it, names it, and looks for its transaction by the property address. That reading comes with your paid plan and doesn't use your monthly credit.

When you open *Unassigned*, you can tell what each doc is and which deal it's for without opening it. Each one waits under a clear name, from your Standardized Document Names when one fits. When its address matches one of your transactions, that transaction is already picked and the name and permission category are filled in, so assigning comes down to a quick check.

Nothing goes onto a transaction on its own. Someone on your team checks each doc and assigns it when it's right.

How It Works

Pipeline Gets the Doc Ready, You Assign It

AI Assign helps you assign. It does the reading, and you make the call.

- **Pipeline** reads each doc that lands in *Unassigned*, whether it's uploaded or emailed in, names it, and picks its transaction when the address matches.
- **You** check both, change either one if it's wrong, and assign the doc.

Where the Name Comes From

Pipeline uses a name from your Standardized Document Names when one fits. When nothing on your list fits or your office hasn't built a list, it names the doc from the form itself. A name from your list also brings the Doc Label and Default Permission Category you set for it. Until Pipeline has read a doc, its row shows the filename it arrived with.

See Which Deal Each Doc Is For

When Pipeline finds a transaction name or property address in a doc, it shows that name in gray beside the doc's name. You can see which deal a doc belongs to before you open it.

How Pipeline Picks the Transaction

When the name Pipeline found matches one of your transactions, the doc's Assign button turns blue. A green button means no transaction matched. If the transaction doesn't exist yet, the doc waits, and it turns blue once that transaction is created.

See What Pipeline Read From a Doc

View what Pipeline read from each doc, and open a short summary of it without opening the doc.

Who Can Do This: Anyone who can see the *Unassigned* page.

To see what Pipeline read from a doc:

- 1 Click **[Unassigned]** in the top menu.
- 2 View each doc's name, and the transaction name in gray beside it if Pipeline found one.
- 3 Hover over the info icon to the left of a doc's name for more.

A box opens with the doc's name and property address, the filename it arrived with, its page count, its file size and a short description of what it is.

The screenshot shows the 'Unassigned Docs' page with 20 docs. A tooltip is visible for a document named 'Listing Packet' at 905 Pecan Grove Lane. The tooltip contains the following information:

- File: Listing_Packet.pdf
- Size: 292.9 KB
- A five-page packet for a townhouse at 905 Pecan Grove Lane, containing an Exclusive Right to Sell Listing Agreement (3 pages) and two seller acknowledgments: a Consent to Intermediary Relationship and a Wire Fraud Warning, all dated 06/16/2026.
- Contains:
 - Listing Agreement (p. 1-3)
 - Consent to Intermediary Relationship (p. 4)
 - Wire Fraud Warning (p. 5)

The table below shows the list of documents:

Doc Name	Transaction	Added By	Added On	Assign
Listing Packet	905 Pecan Grove Lane	Fred T.	Just now	assign
Report	641 Sycamore Street	Fred T.	6 mins ago	assign
Contract	641 Sycamore Street	Fred T.	6 mins ago	assign
Letter	641 Sycamore Street	Fred T.	6 mins ago	assign
on Report	641 Sycamore Street	Fred T.	6 mins ago	assign
visory	641 Sycamore Street	Fred T.	6 mins ago	assign
Check	641 Sycamore Street	Fred T.	6 mins ago	assign
Contract	641 Sycamore Street	Fred T.	6 mins ago	assign
Check	641 Sycamore Street	Fred T.	6 mins ago	assign
raisal Report	641 Sycamore Street	Fred T.	6 mins ago	assign
e Report	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Contract	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Letter	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Home Inspection Report	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Earnest Money Check	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Seller's Counter Offer	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Earnest Money Check	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Sale of Other Property Addendum	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Buyer's Contract-to-Close Checklist	506 Magnolia Avenue	Fred T.	1 hr ago	assign
Residential Appraisal Report	506 Magnolia Avenue	Fred T.	1 hr ago	assign

Assign the Docs Pipeline Has Named

Check the name and transaction Pipeline picked, then assign one doc or several for the same deal.

Who Can Do This: Anyone with **Assign docs to transactions** permission.

To assign docs Pipeline has named:

- 1 Click **[Unassigned]** in the top menu.
- 2 Click a doc's **[Assign]** button.

To assign several docs for the same deal at once, check the box next to each one, then click **[Bulk]** and **[Assign]**.

- 3 Check the transaction at the top of the page. If the button was blue, it's already chosen. If it was green, search for the transaction and click its **[Assign]**.
- 4 Check each doc's name, and choose a permission category if one isn't set.
- 5 Click **[Assign Doc]**, or **[Assign Docs]** for several.

Assign Documents: 905 Pecan Grove Lane, Anytown, TX 00000

Back to Step 1

Choose a transaction. ?

Suggested Transaction	Status	Complete	Agents	Close Date
assign 905 Pecan Grove Lane, Anytown, TX 00000 Tow Listed		0 / 6		

Want to assign to a different transaction? [View all transactions](#)

Step 2

View, name, and categorize your docs. ?

File	Email Subject or...	Document Name	Permission Category	Rev
Contr Listing_...		Listing Agreement	Listing	☐
Contr Agency...		Agency Disclosure	Listing	☐

Assign Docs

You'll land on the transaction with your docs listed. If the deal isn't in Pipeline yet, create the transaction first, and the doc's button turns blue.

Create the Transaction First

When a doc's deal isn't in Pipeline yet, start the transaction from its contract with AI Create. Once the transaction exists, the deal's other docs in *Unassigned* will be automatically preassigned to it.

Check the form AI Create fills in from a contract, then save it as a new transaction.

See [AI Create](#)

Split a Packet Into Separate Docs

When a doc that lands in *Unassigned* holds several documents, Pipeline works out where each one starts and ends in the same read, so you can split the packet before you assign the new docs.

Break apart an unassigned packet into separate docs, along the cuts AI Break Apart found.

See [AI Break Apart](#)

Build the List Pipeline Names From

The fuller your list, the more docs arrive with your own names, labels and permission categories.

Build a shared list of your company's document names, and everyone on your team names the same form the same way — with your preferred label and permission category already attached.

See [Standardized Document Names](#)

Turn AI Assign Off or On

A master admin decides whether Pipeline reads your incoming docs at all, on the same page that sets who can use AI Create and AI Update.

Choose who can use Pipeline AI, and limit what it costs once your monthly credit is used.

See [AI Settings](#)

Frequently Asked Questions

Does Pipeline assign docs by itself?

No. AI Assign helps you assign. It names the doc and picks the transaction when the address matches, and the doc stays in *Unassigned* until someone checks it and clicks Assign.

What if the blue button picked the wrong transaction?

Pick a different one before you assign. On the assign form, click [Back to Step 1], search for the right transaction, and click [Assign] beside it.

Can I change the name Pipeline chose?

Yes. Hover over the doc, click the pencil and type a new name, or change it when you assign the doc.

Can I teach Pipeline which name to use?

Only through your list. Add or adjust a name in your Standardized Document Names, and Pipeline has it to choose from.

Does AI Assign use our Pipeline AI credit?

No. It's part of your paid plan. It never draws on your monthly credit or counts toward your monthly spending limit.

Does AI Assign work during a free trial?

No. It starts once your account is on a paid plan.
