AI Assign

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Review the name and transaction AI Assign picked for each new doc in *Unassigned*, then assign it.

Introduction

AI Assign is the part of Pipeline AI that sorts the docs coming into *Unassigned*, so they're ready for you to assign. It works on its own on every doc that comes in. It renames each one and pre-assigns it to the transaction whose name or property address matches.

By the time you open *Unassigned*, each doc has a clear name, from your Standardized Document Names or from the form itself, in place of the number a scanner gave it. Its transaction is already picked, so all you do is review it and assign it.

A doc goes from *Unassigned* onto a transaction only when someone on your team assigns it.

How It Works

Pipeline Gets the Doc Ready, You Assign It

AI Assign helps you assign.

- **Pipeline** reads each doc that lands in *Unassigned*, whether it's uploaded or emailed in, renames it, and pre-assigns it when its transaction name or property address matches one of your transactions.
- **You** review 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. If the name matches one of your transactions, Pipeline pre-assigns the doc to it and its Assign button turns blue. A green Assign button means no transaction matched. When that transaction is created, Pipeline pre-assigns the doc and the button turns blue. Either way, the doc stays in *Unassigned* until someone assigns it.

See What Pipeline Read From a Doc

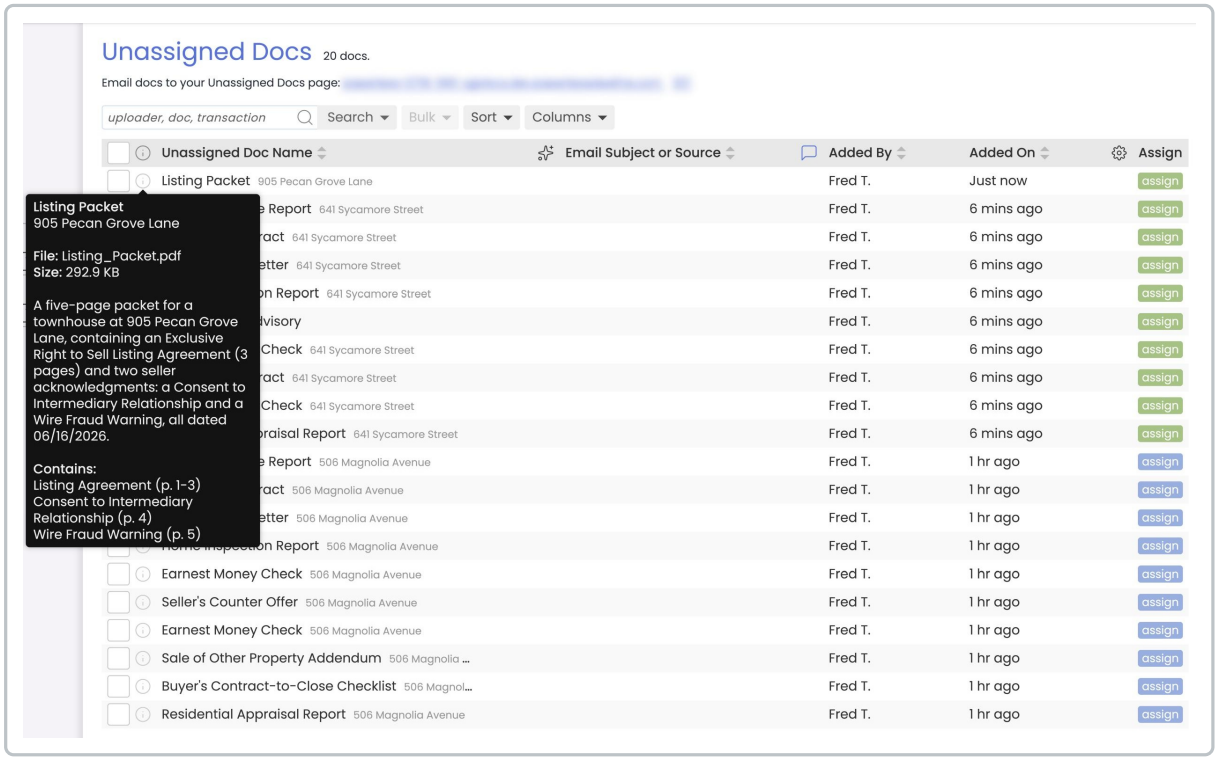
View what Pipeline read from each doc, and a short summary of it, from the info icon beside its name.

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.



Assign the Docs Pipeline Has Named

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

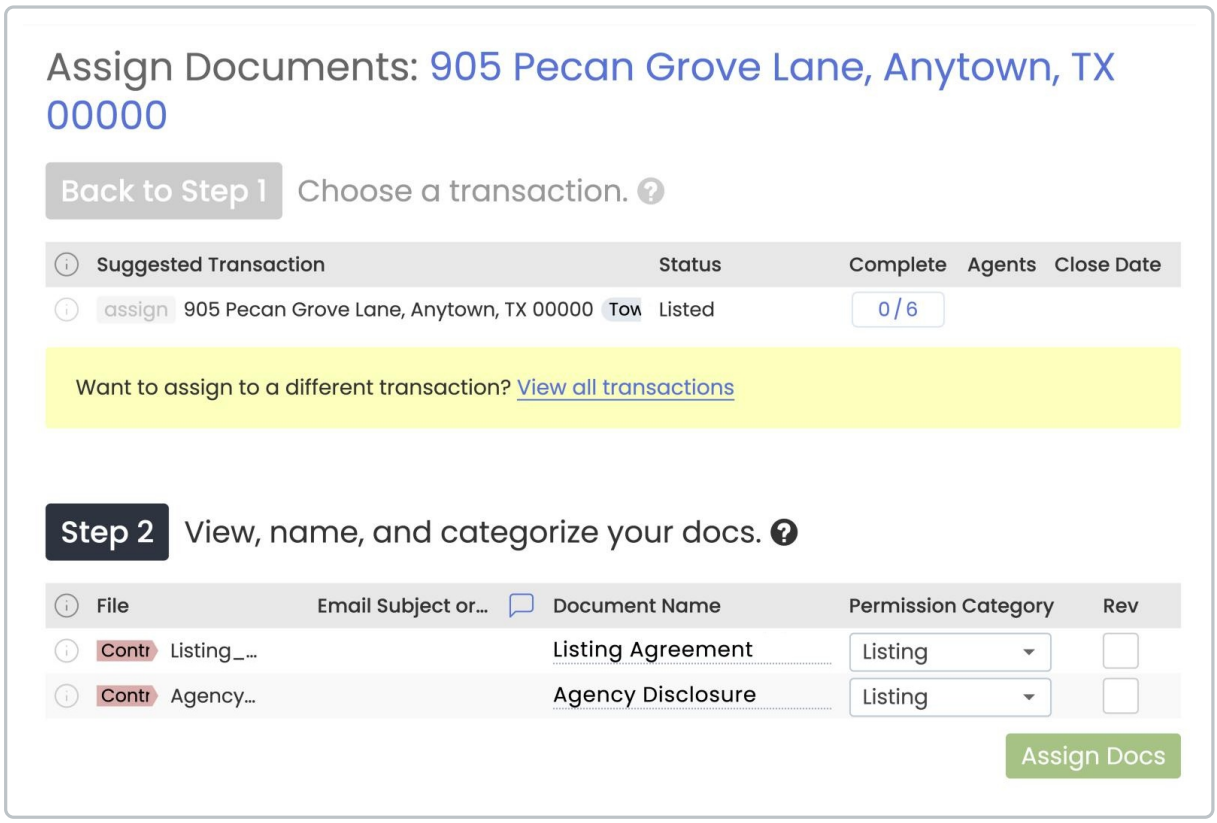
Who Can Do This: Anyone with **Assign docs to transactions** permission.

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



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 is pre-assigned to it.

More Topics

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* are pre-assigned to it.

Review the *Add Transaction* form AI Create fills in from a contract, then add the 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.

Review the documents AI Break Apart found inside a packet in *Unassigned*, then break it apart.

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 Pipeline AI Settings

Frequently Asked Questions

Can we turn AI Assign off?

Yes. A master admin can turn it off on the Pipeline AI Settings page, and Pipeline stops reading the docs that come into *Unassigned*.

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.

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.

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.

What if a doc was pre-assigned to 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.