Unassigned

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The holding queue for documents that have arrived and not yet been filed: everything emailed in lands here first, and this is where it gets a transaction, a name, and a permission category.

Introduction

Unassigned is a workqueue, not a folder. Every doc on it is on its way to a transaction, and each row tells you what the doc is, who added it, and what it came in with, so you can work down the list without opening every file.

It is also the answer to the most common false alarm in the product: a doc that seems to have vanished after an agent emailed it in is sitting here, waiting on a person.

The Queue

What Is Waiting

Every doc that arrived without a transaction, with who added it, its location, and the subject line it came in under. Your own maildrop address sits at the top of the page.

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

Find One Row in Fifty

The page has its own search field and sortable columns, and both behave in ways worth knowing before you decide a doc is not there.

Fifty rows in the queue and you want one of them. The Unassigned page has its own search field and sortable columns, and both behave in ways worth knowing before you decide a doc isn't there.

See Unassigned Docs Search

Getting Docs In

Upload Here

Drag a stack in from this page and it waits in the queue for filing. Uploading here asks for a location.

Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

See Uploading Docs

Email Docs In

Send or forward a message to a maildrop address and Pipeline pulls the attachments in. A doc sent to your maildrop address for a transaction arrives already pointed at it.

Email, forward or scan docs into Pipeline without logging in. Pipeline pulls the attachments into Unassigned, ready to file on the right transaction.

See Your Unassigned Maildrop Address

Filing

Put a Doc on Its Transaction

Assigning sets the transaction, the name, and the permission category in one step. A blue Assign button already knows its transaction; a green one is yours to choose.

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

Who Filed What

Every doc filed out of Unassigned leaves a record you can search by doc, by transaction, or by the person who did the filing.

Every doc filed out of Unassigned leaves a record — search it by doc, by transaction, or by the person who did the filing.

See Assignment History

Working a Doc Before You File It

Combine Several Into One

Merge PDFs while they are still in the queue, named the way your office names things.

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*.

See Doc Merge

Split a Scanned Stack

One scan, many documents. Break it apart here and name each piece as you go.

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

Turn One the Right Way Up

Rotate a doc that arrived sideways and the corrected version is what gets filed.

Uploaded sideways or upside down? Two clicks turn a doc the right way up, and it stays that way for everyone.

See Doc Rotation

Deleted Docs

Where a Deleted Doc Goes

It lands in Deleted Docs for a year, with a record of who removed it and when.

Delete a doc and it doesn't vanish. It lands in *Deleted Docs*, where it stays for a year with a record of who removed it and when.

See Deleted Docs

Put One Back

Download it from Deleted Docs and upload it again. That is the whole recovery.

Download a deleted doc back out of *Deleted Docs*, then upload it again — that's the whole recovery, and you can do it without emailing us.

See Doc Recovery

Signed Documents

Signed Copies Coming Back

When the last signature lands on a request, the signed document comes back to Pipeline on its own and passes through this queue.

Every request you've sent sits in one list, so you can see who has signed and who is holding things up. When the last signature lands, the signed document comes back to Pipeline on its own.

See eSign Requests