Unassigned Documents in Encompass

*Bot will need to be configured for all pop-up error messages that the existing archive bot is coded for.*

**Open loan in encompass, then click on eFolder**

**A screenshot of a computer

Description automatically generated**

**Open File Manager**

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**Click the paper plus button to add a new document, then click ok on the pop-up**

**A screenshot of a computer

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**Click the dropdown and choose \*Unassigned Documents, then click close or the X at the top of the window.**

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**Select all of the documents in the top box, and drag them into the \*Unassigned Documents bucket underneath.**

**A screenshot of a computer

Description automatically generated**

**Close all the screens and the loan, click Yes on the pop-up to save the loan.**

**A screenshot of a computer screen

Description automatically generated**