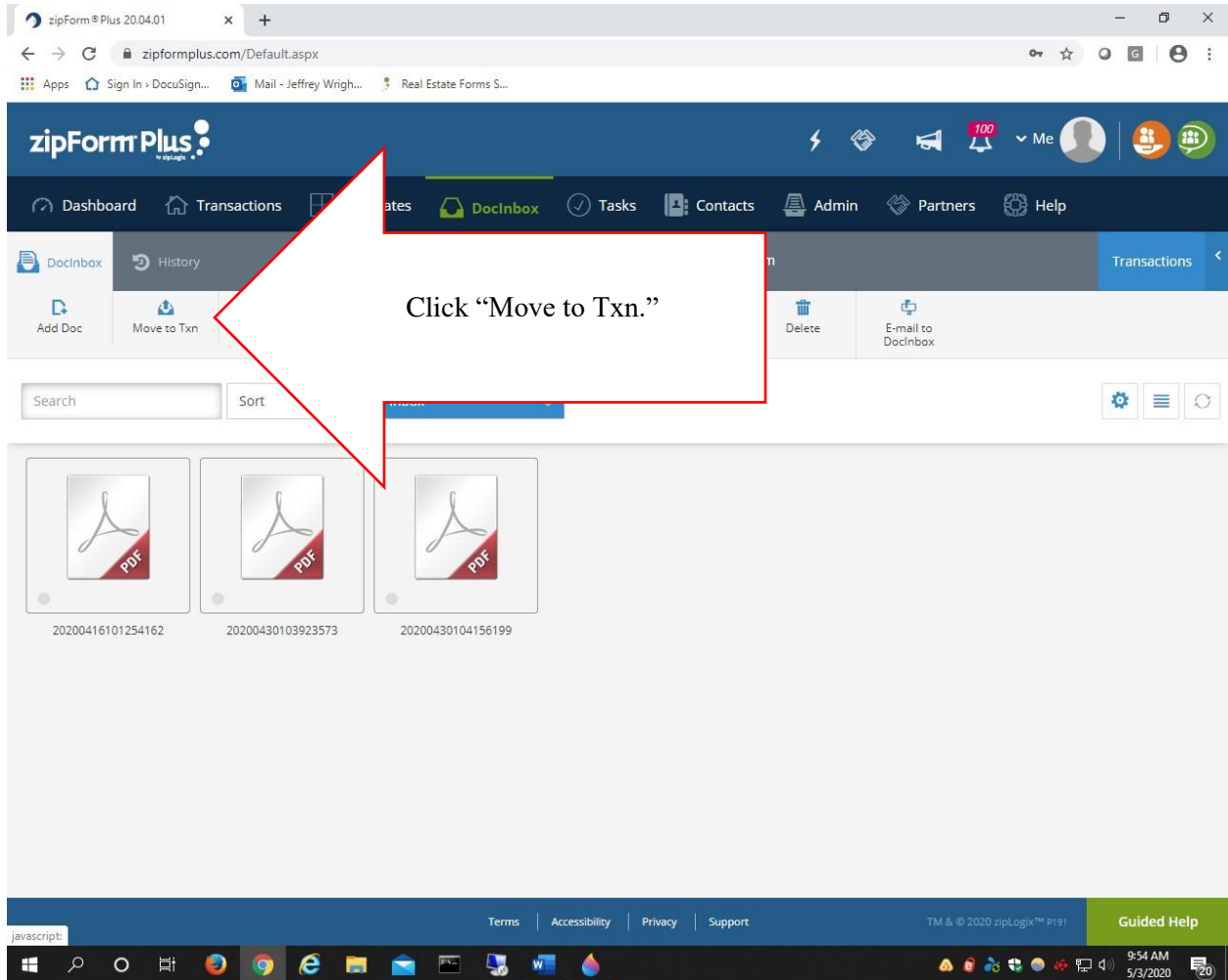# Moving Documents from DocInbox to a Transaction

This guide presumes that you know how to send documents to your DocInbox. If you do now know how to do this, please see the guide titled, "Scanning to Your DocInbox."

Once you have uploaded documents to your DocInbox, click on the "Move to Txn" button.
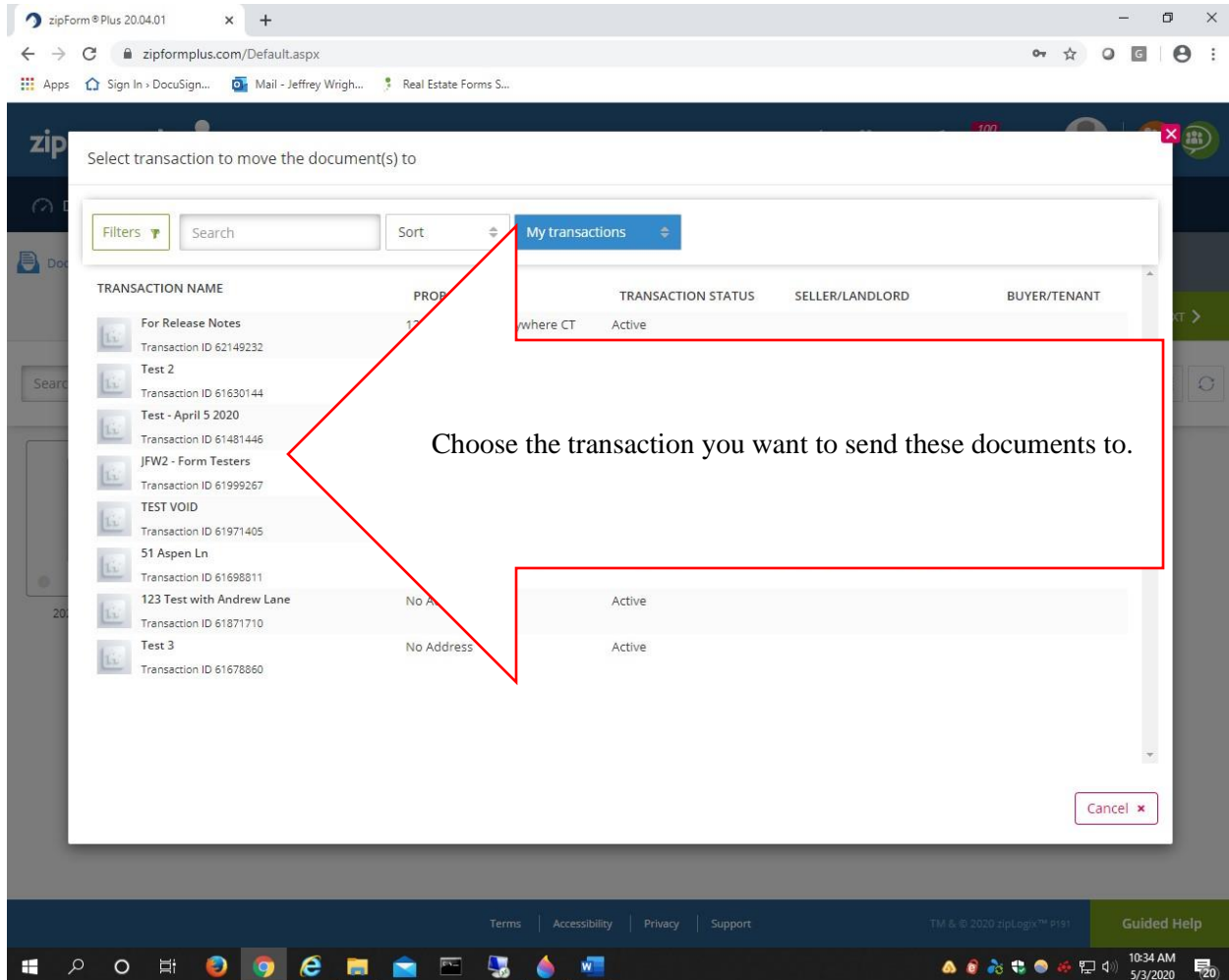
Moving Documents from DocInbox to a Transaction

Choose the documents you want to move by clicking into the square box in the upper right-hand corner of each document you are moving.

Once you have selected each document, click "Next."

Moving Documents from DocInbox to a Transaction

Now, you need to select the transaction that you are sending these documents to.

*Note: Once you have selected a transaction, the documents will be moved, and you will return to the DocInbox home page. The documents will no longer be visible in your DocInbox.

*If you would like the documents to stay in your DocInbox **and** go to a specific transaction, choose "Copy to Txn" rather than "Move to Txn."*
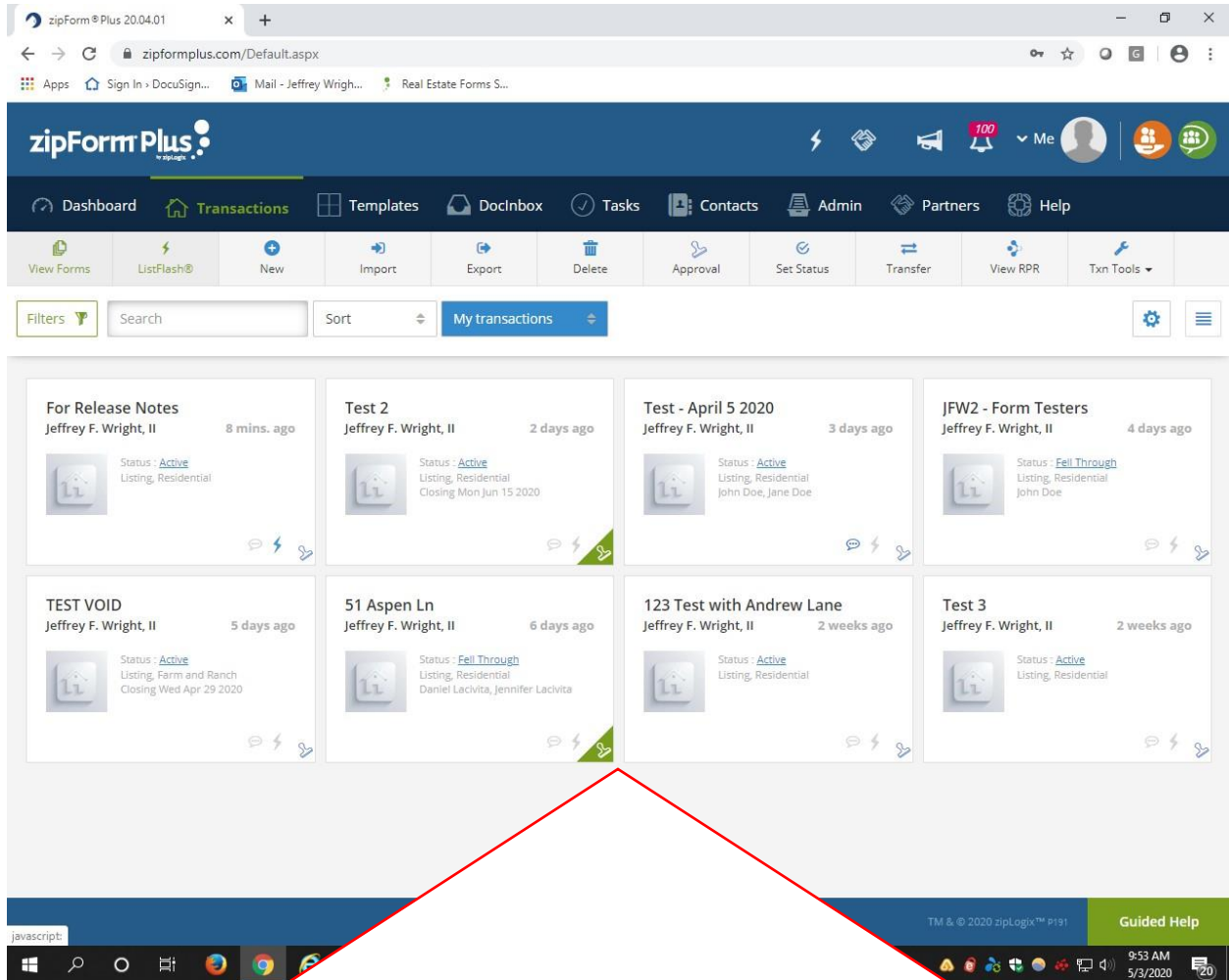
Moving Documents from DocInbox to a Transaction

Click on the transactions icon to return to your transactions page.

Click here to get to your transactions.
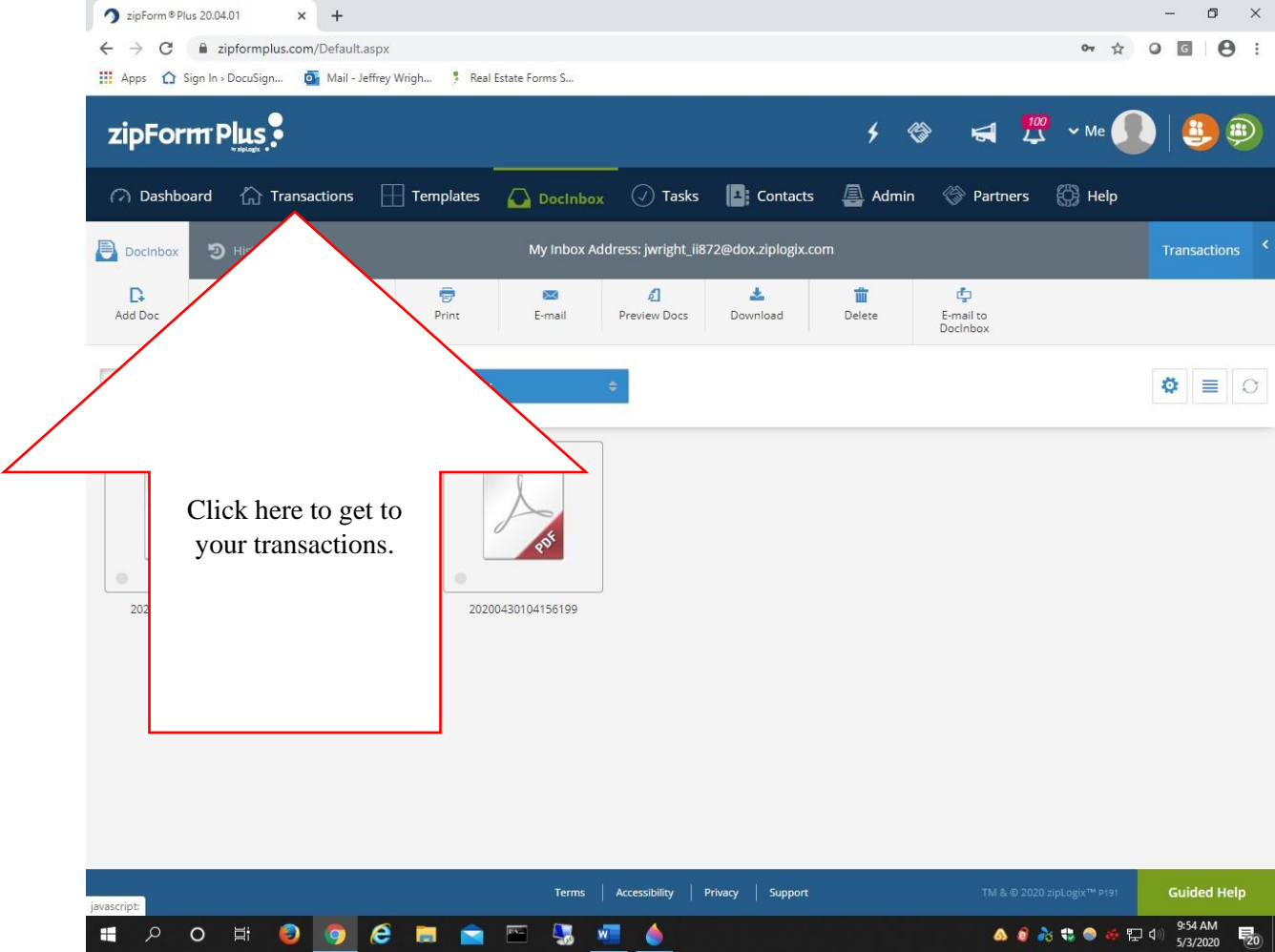
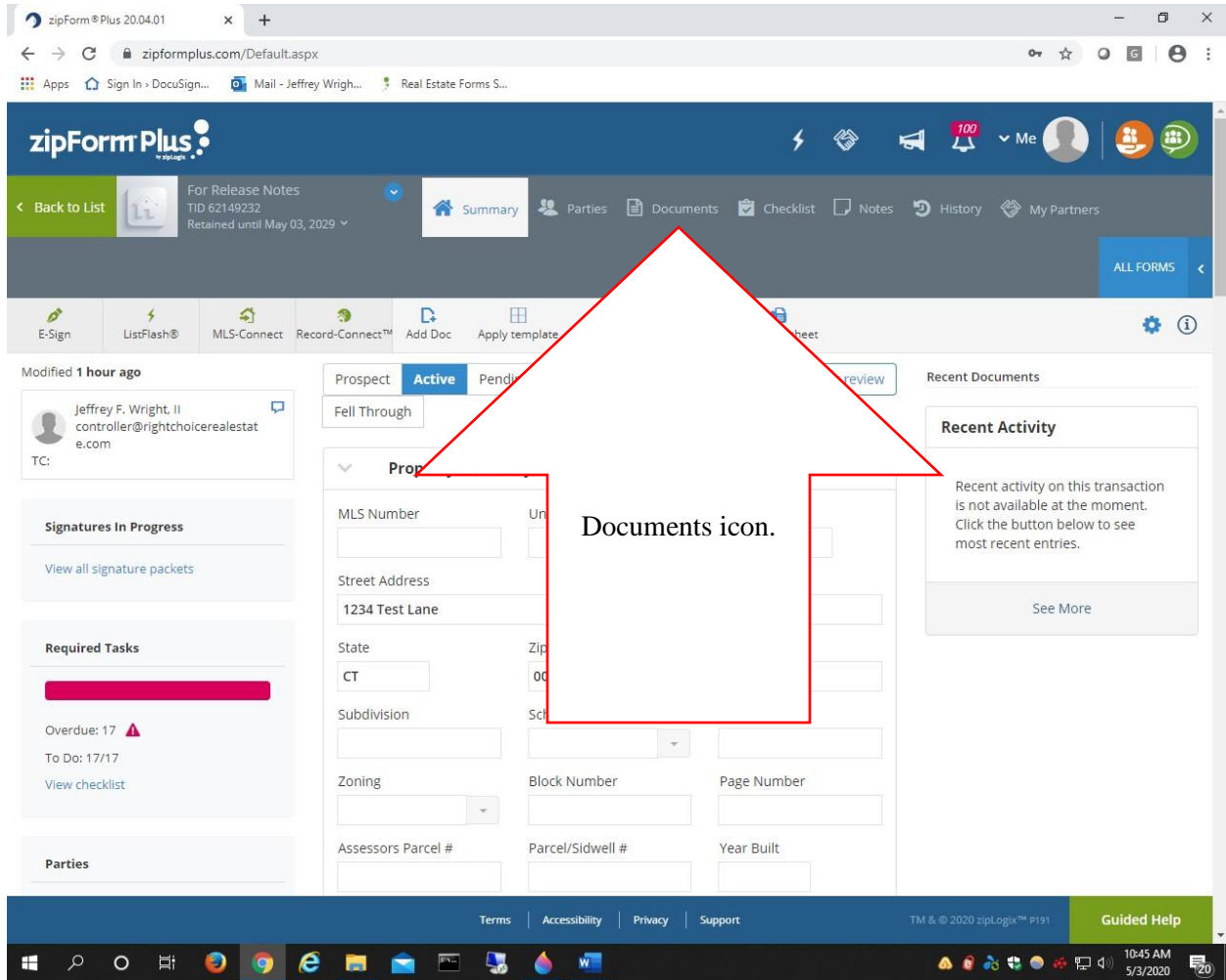# Moving Documents from DocInbox to a Transaction

Then choose the transaction you just moved your documents to.

Choose the transaction you
just sent your documents to.

Moving Documents from DocInbox to a Transaction

When you click into a transaction, you land on the Summary Page for that transaction. From the summary page, click on the "Documents" icon.

Documents icon.

Moving Documents from DocInbox to a Transaction

Your documents will appear in the documents page.

Your documents arrive here and can be moved to their respective folders and placeholders within their folders.