

Setting Up Docs

Docs in Paperless Pipeline are organized, categorized, and always within reach to keep transactions running smoothly.

Introduction

How It Works

Organize Docs with Tags (Doc Labels)

Keep Names Uniform (Doc Names)

Maintain a Centralized Doc Library (Reference Docs)

Control Who Can See and Edit What (Permissions for Docs)

Notify the Right People About Docs (Notifications for Docs)

Using Docs

Once set up, learn how to upload, assign, manage, and collaborate on docs throughout Paperless Pipeline.

Learn how to [Use Docs](#).