

Document Labels

Use custom, color-coded labels to visually organize and filter your documents. Labels make it easy to sort, group, and manage docs across transactions.

Introduction

Document Labels let your team apply color-coded tags to documents so they can be grouped by type, status, admin initials, or any custom category you define.

Admins can create and manage the labels. Agents can use them when organizing docs inside a transaction.

View Document Labels

Add a Document Label

Edit a Document Label

Remove a Document Label

Require Doc Labels

Standardize Doc Labels

Learn more about [Standardized Document Names](#)

Apply Doc Labels

Apply a Doc Label

➔ [Upload Docs](#)

[Bulk Apply Doc Labels for Unassigned Docs](#)

➔ Manage Docs