

Standardized Document Names

Standardized Document Names let you define your company's most-used document types — like Purchase Agreement, Wire Instructions, or Commission Form — so your team can apply them quickly and consistently.

You can also associate each name with a default Document Label and Permission Category, which saves time and helps enforce office-wide standards.

How It Works

Add a Doc Name

Bulk Add Doc Names

Edit a Doc Name

Remove a Doc Name

Apply Doc Names

Name Docs

➔ Upload a Doc

Use Standardized Doc Names

Automatically Match Tasks to Docs

➔ View Docs