Custom Reference Library

Create a shared space where your team can access key forms, disclosures, training materials, and helpful links — all from one central page in Pipeline.

Introduction

The Reference Library is your company's internal knowledge hub. It holds documents and links your team uses often — like onboarding packets, local disclosure forms, how-to guides, or broker resources.

Admins can add, organize, update, and remove resources. Agents can view, download, and email them at any time.

How It Works

You might use the Reference Library to share:

- A blank W9 form A training PDF called "How to Upload Docs to Pipeline"
- A link to your company's transaction checklist Google Doc
- A category called "Training" to group all of your onboarding materials

Example

Add a Reference Doc

Add a Reference Link

Add a Reference Category

Edit a Reference Category

Reorder References

Rename / Move a Reference

Delete a Reference

Bulk Delete References

Comment On References

Use Your Reference Library

View Reference Docs

➡ View Docs

Share Reference Docs

➡ Share Docs