Set Up and Manage Reference Docs & Links

Use the *Reference* page as a library to store and share your company's frequently used forms, disclosures, training materials, and other documents or links your agents and admins needs access to regularly.

Once an admin adds docs or links to*Reference*, your team can easily access the information they need without having to hunt for it. Learn how to Download and Use Reference Docs & Links →

From the Reference page , admins can add, organize, and delete your company's shared *Reference* documents and links.

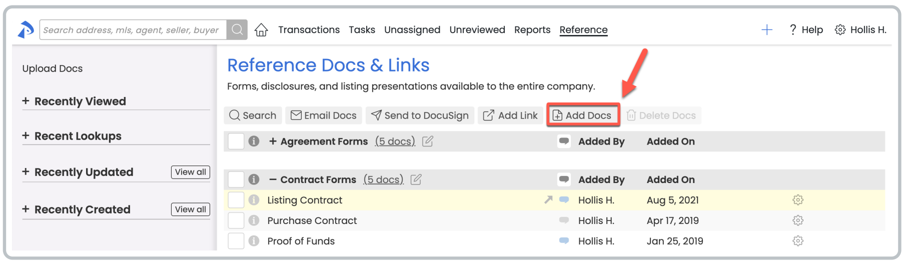
Add a Reference Doc

Add a document to the*Reference* page so your team can easily access it.

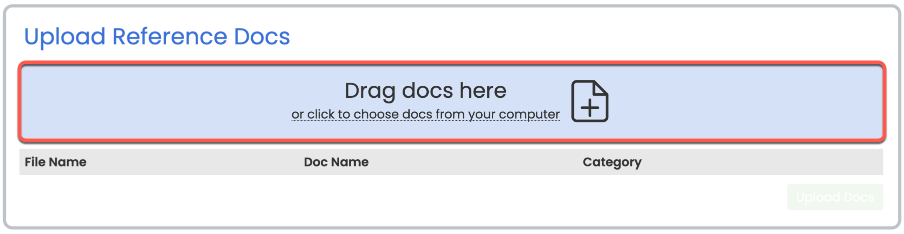
Who Can Do This? Admins.

To add a *Reference* doc:

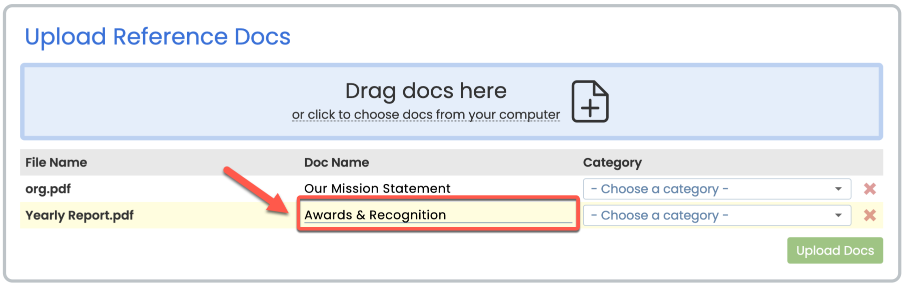
1. **Go to Your Reference Library**
   - Click [Reference] from the top menu.
2. **Click [? Add Docs]** at the top of the page.



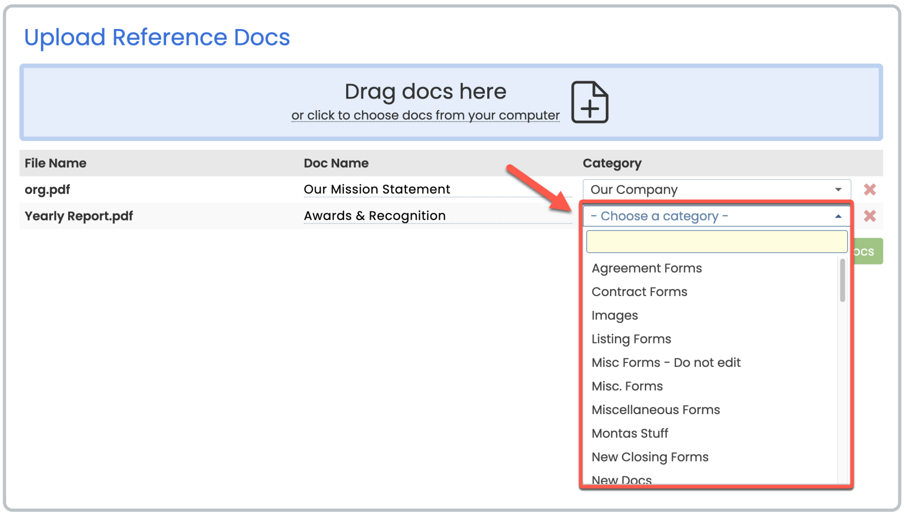
3. **Choose *Reference* docs to upload** by dragging them from your computer into the blue box, or by clicking the blue box to select them from your computer.



4. **Name the doc(s)** by entering their *Doc Name.*



5. **Categorize the doc(s)** by selecting [- Choose a category -] and choosing an existing*Reference Category* or by entering a new*Category*.



6. **Click [Upload Docs]**. Once *Reference* docs are added, agents and admins can view, download and email them. Learn how →

Add a Reference Link

Add a link to the*Reference* page so your team can easily access it.

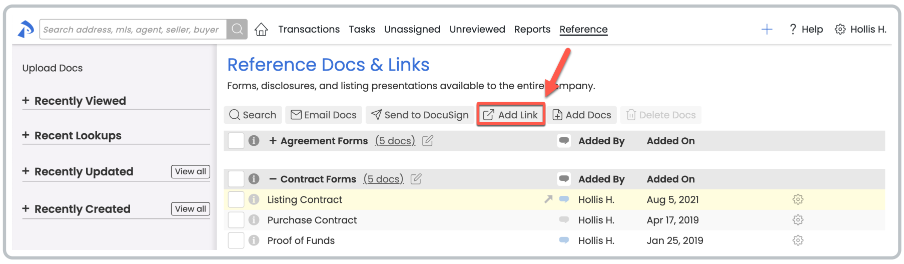
Who Can Do This? Admins.

To add a *Reference* link:

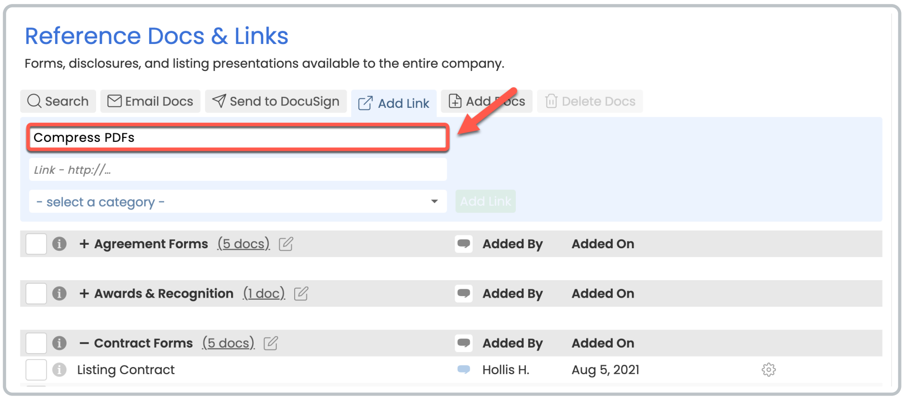
1 **Go to Your Reference Library**

- Click [Reference] from the top menu.

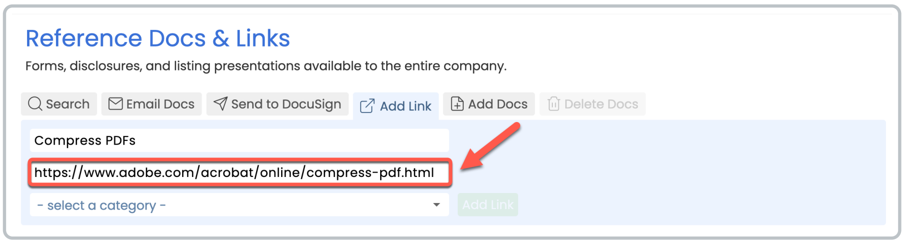
2 **Click [▯ Add Link]** at the top of the page.



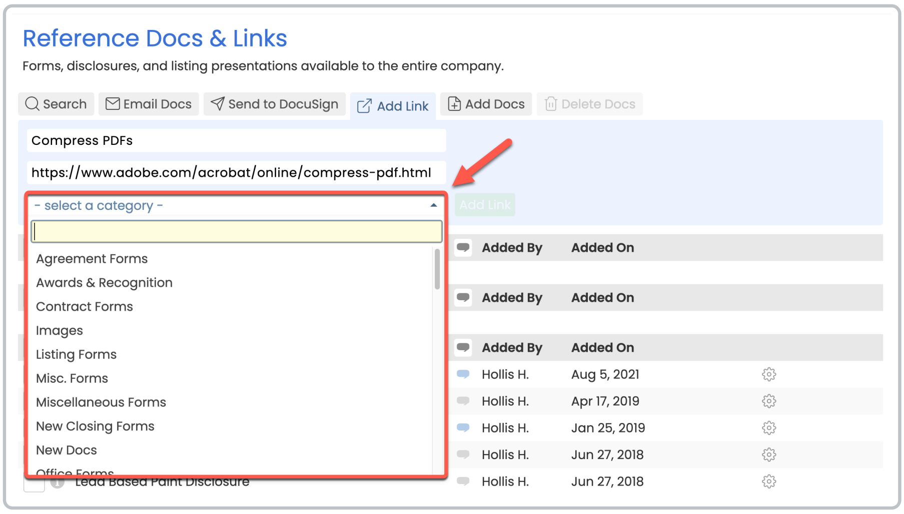
3 **Name the link** by entering the *Link Name.*



4 **Enter the *Link* URL.**



5 **Categorize the link** by choosing [- Select a category -] and selecting an existing *Reference Category* or by entering a new *Category*.



6 **Click [Add Link].** Once *Reference* links are added, agents and admins can view and email them. Learn how →

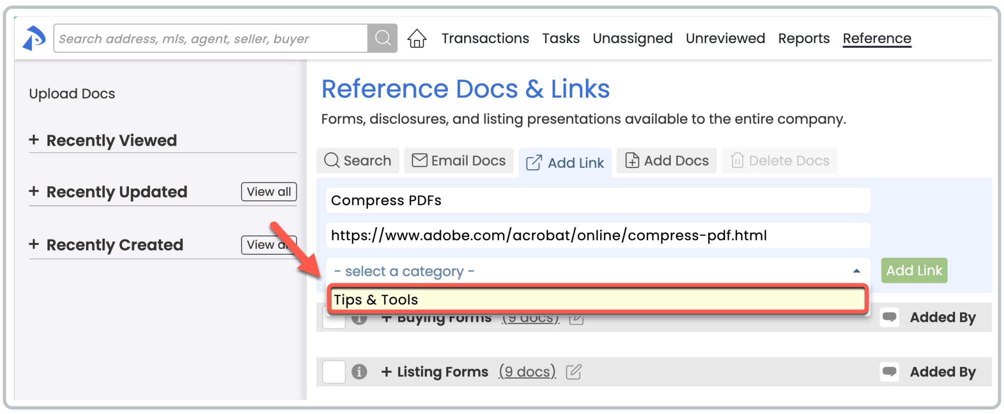
Add a Reference Category

Create a new category to appropriately group*Reference* docs and links.

Who Can Do This? Admins.

To create a new category on the*Reference* page:

1. As you are adding / editing a*Reference* doc or link (described above), **click the [- category -] dropdown menu.**
2. **Type the name of the new*Reference* category.**



3 Continue adding or editing the *Reference* doc or link.

Edit a Reference Doc

Update a *Reference* doc's name or move the doc to another category.

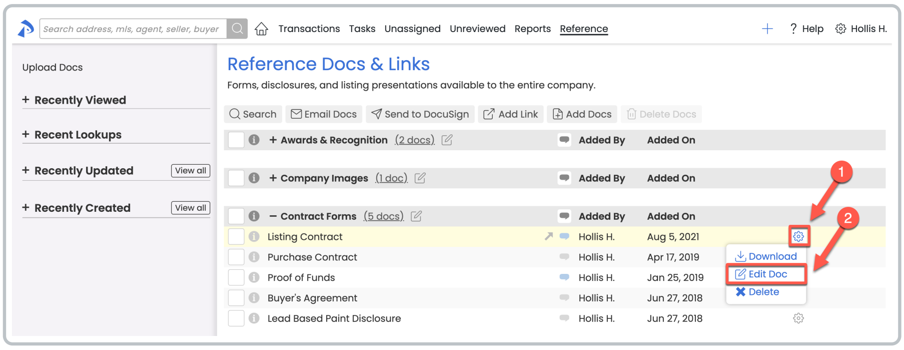
Who Can Do This? Admins.

To make a change to a *Reference* doc's name or category:

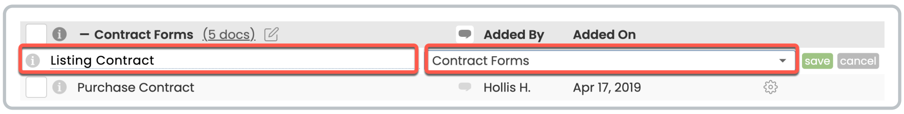
1 Go to Your Reference Library

- Click [Reference] from the top menu.

2 Click [⚙] to the right of the doc you want to edit, then [Edit Doc].



3 Update the doc's *Name* or *Category*.



4 Click [Save].

Edit a Reference Link

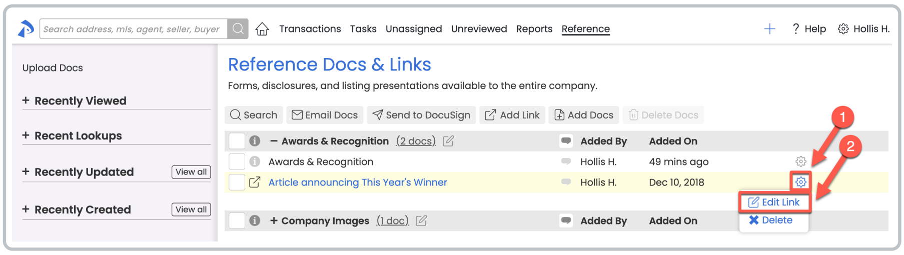
Update a *Reference* link's name, URL or move it to another category.

Who Can Do This? Admins.

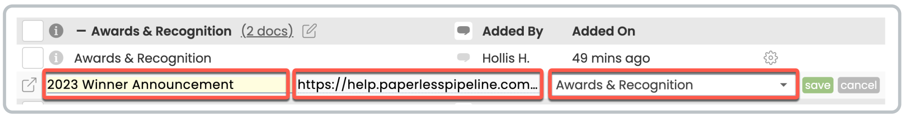
To make changes to a *Reference* link:

1. **Go to Your Reference Library**
    - Click [Reference] from the top menu.

2. **Click [⚙] to the right of the link you want to edit, then [Edit Link].**



3. **Update the link's *Name*, *URL*, or *Category*.**



4. **Click [Save].**

Edit a Reference Category

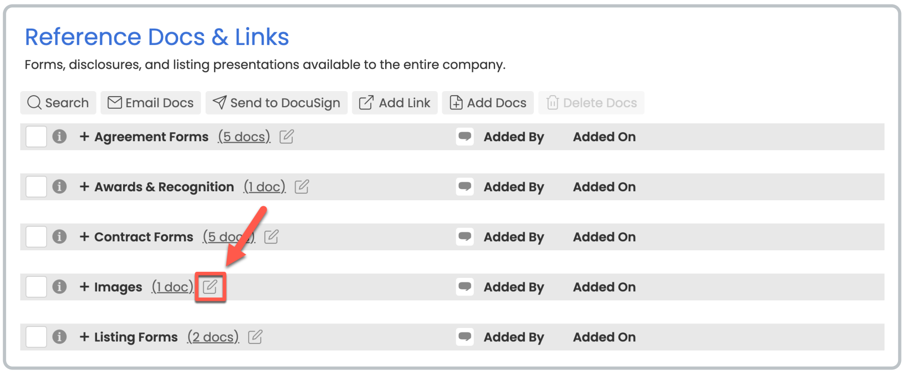
Update the name of a*Reference Category* to appropriately group docs and links.

Who Can Do This? Admins.

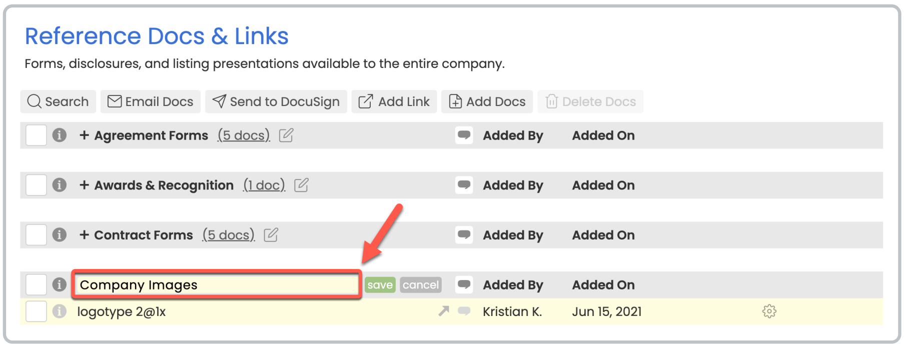
To change the name of a*Reference Category*:

1. **Go to Your Reference Library**
    - Click [Reference] from the top menu.

2. **Click [the pencil icon]** to the right of the category you want to change.



3 **Enter the new name** for the *Reference Category*.



4 **Click [Save].**

Comment on a Reference Doc or Link

Comment on a *Reference* doc or link to share more details about it with your team.

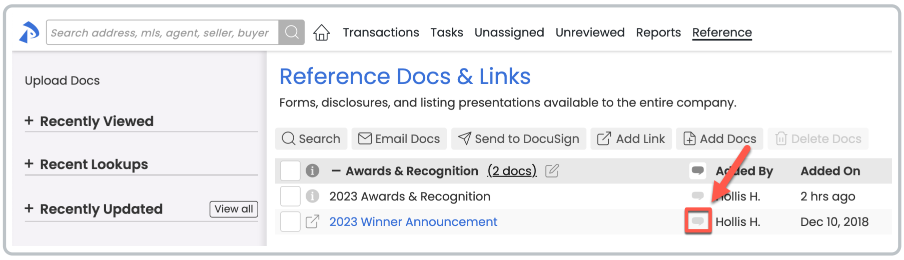
Who Can Do This? Admins.

To comment on a *Reference* doc or link:

1 **Go to Your Reference Library**

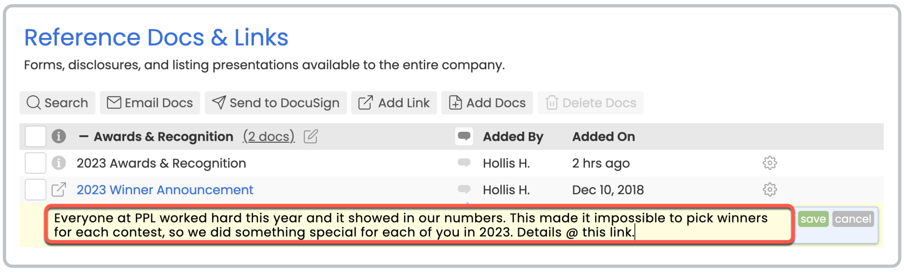
- Click [Reference] from the top menu.

2 **Click [the comment icon]** next to the doc or link you want to make a comment on.



3 **Add a new comment or make changes to an existing one:**

- To add a new comment, enter it in the yellow comment box.
- To make changes to an existing comment, click [the edit icon] then update your comment.



4 **Click [Save].** Once comments are added, agents and admins see them when viewing *Reference* docs and links.

Reorder Reference Docs & Links

Change the order of your company'sdocs and links on the*Reference* page.

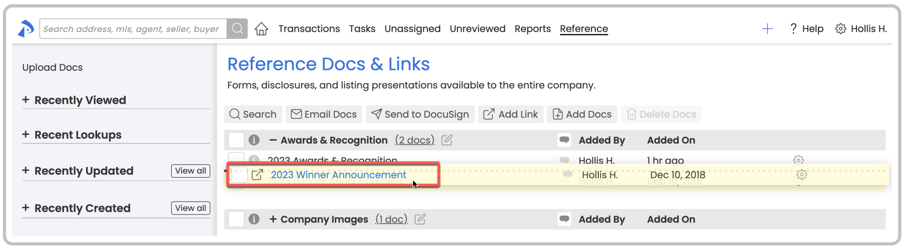
Who Can Do This? Admins.

To change the order of *Reference* docs and linkswithin a *Category*:

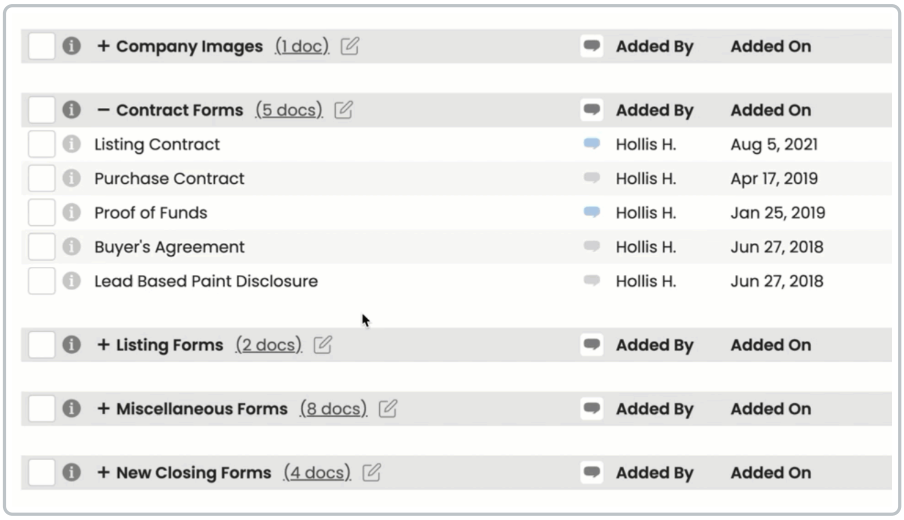
1 **Go to Your Reference Library**

- Click [Reference] from the top menu.

2 **Click a doc or link, then hold and drag it.**



3 Drop it into a new position within the *Category*.



Delete Reference Docs & Links

Delete an unneeded doc or link on your company's *Reference* page.

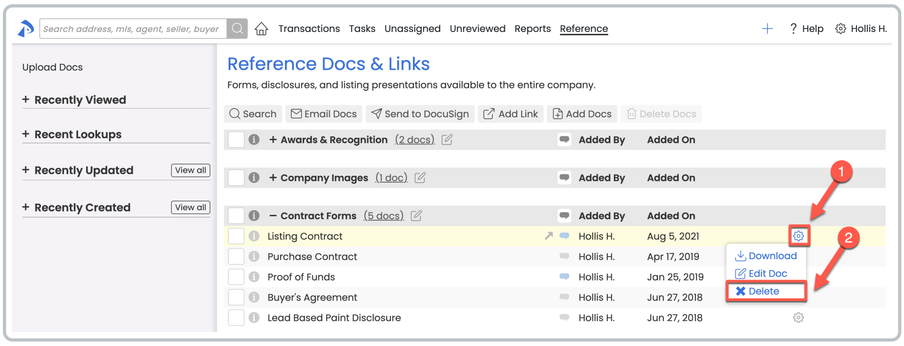
Who Can Do This? Admins with permission to *Delete any docs*.

To delete an unneeded doc or link from the *Reference* page:

1 Go to Your Reference Library

- Click [Reference] from the top menu.

2 Click [⚙] to the right of the doc or link you want to delete, then [Delete].



3 **Click [delete] again to confirm the deletion**

Bulk Delete Reference Docs & Links

Delete multiple unneeded docs or links at once on your company's *Reference* page.

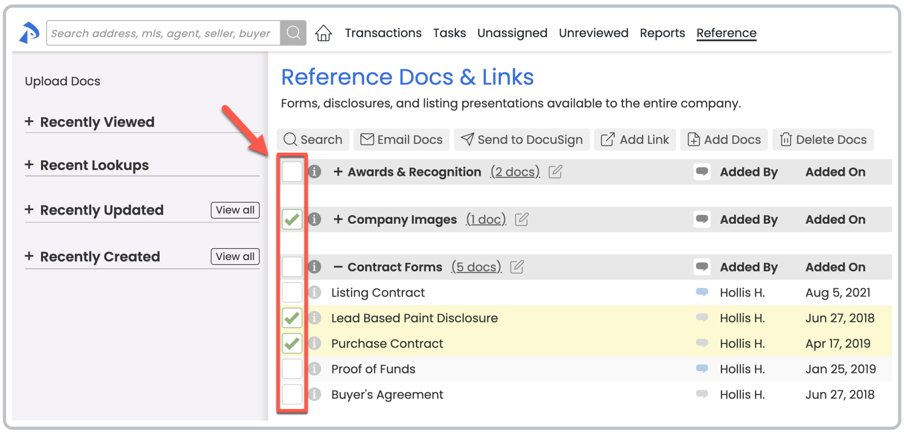
Who Can Do This? Admins with permission to *View all transactions* and *Delete any docs.*

To delete multiple unneeded docs or links from the *Reference* page at once:

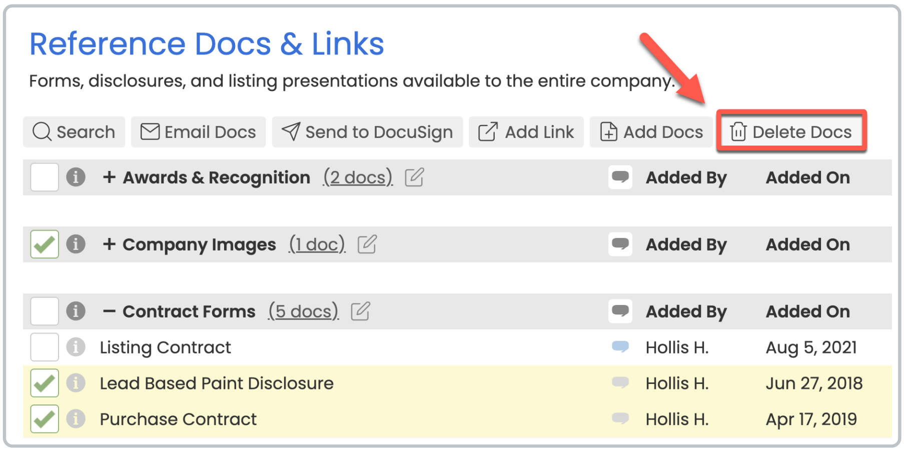
1 **Go to Your Reference Library**

- Click [Reference] from the top menu.

2 **Choose the docs or links you want to delete** by checking the box for an individual doc, link or an entire category.



3 **Click [Delete Docs]** at the top of the page.



4 **Click [Delete] again to confirm the bulk deletion**

Building a custom training library ?

Watch this to become a Pipeline Pro on the*Reference* page: Whether you need to implement initial roll-out training or ongoing training for new agents, you won't want to miss this session! You'll learn how to create custom training libraries that will help you train your team on the parts of Pipeline they need to know.

Who Can Do This? *Paperless Pipeline Pro Webinars* are for master admins and admins with permission to *View all transactions.*

? **10:03**

View more Paperless Pipeline Pro Webinars →

The Reference Page ?

Watch this to become a Pipeline Pro on the*Reference* page: This Pipeline Pro webinar covers the various options available on the *Reference* page as well as how to best utilize them.

Who Can Do This? *Paperless Pipeline Pro Webinars* are for master admins and admins with permission to *View all transactions.*

6:29

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