Doc Labels

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Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

Introduction

Open a transaction carrying forty documents and the question is always the same one: where are the disclosures? There are no folders inside a transaction, so scrolling is the only tool you have until the documents themselves carry something you can sort on.

Doc Labels are that something. Each color gets named for what your office actually needs to spot at a glance: *Needs Signature*, *Rejected*, *Lease*, a document type, a coordinator's initials. The names carry across the whole account, so a label means the same thing on every transaction and in *Unassigned Docs*, and anyone working on a doc can put one on.

Labels are about organizing and nothing else, and that's the whole job: a doc list you can pull into the groups you actually work in, and a way to flag one document so the right person notices it. Putting one on a doc never changes who's allowed to open it, so you can tag freely without worrying you've shown somebody something they shouldn't see.

How It Works

A fixed set of colors, named by you, applied wherever docs live.

You Get 14 Labels

Pipeline gives you 14 color-coded labels. The colors themselves are fixed, but the name on each one is yours to write, and you can rewrite it whenever your process changes.

Where Labels Apply

Put a label on a doc inside a transaction, or on a doc sitting in Unassigned. In Unassigned you can label a whole batch at once.

Sort by Label

Click the label column on a transaction's doc list and the docs sort by their label. Click it again to reverse the order. Docs without a label sit out of the sort and stay at the bottom.

Your Sort Is Your Own

Pipeline remembers the sort you chose in your own browser, so what you set doesn't change what your teammates see. Everyone picks their own.

Labels Organize, Categories Control Access

A doc label is a tag you invent for organizing. A permission category decides who can view the doc, and that set is

fixed. When you want a category Pipeline doesn't offer — *Closing Documents*, *Referral*, *Lease* — a label is the tool for it.

Name a Doc Label

Give a color a meaning. This is the setup step — do it once, and everyone can start applying it.

Who Can Do This: Admins.

To name a doc label:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the left menu, click [Document Labels].
3. Click directly on a label name, or click the [Gear] beside it and choose [Edit Label].
4. Enter the name you want — a document type, a status, a priority, an admin's initials.

The label is ready to use across the account. Rename it later and every doc already wearing it picks up the new name.

Apply a Doc Label to a Doc

Tag a single document from the transaction or from Unassigned.

Who Can Do This: Admins, on docs in their locations. Agents, only on docs they uploaded, and only until an admin marks the doc as Reviewed.

To apply a doc label to a doc:

1. Go to the transaction's docs, or to the Unassigned page.
2. Hover over the doc's name until the label icon appears.
3. Click the [Label] icon, then choose the label you want.

The label shows in color beside the doc from then on, for everyone who can see that document.

Remove a Doc Label From a Doc

Take a label off once it's served its purpose — when the correction lands or the doc is signed.

Who Can Do This: Admins, on docs in their locations. Agents, only on docs they uploaded, and only until an admin marks the doc as Reviewed.

To remove a doc label from a doc:

1. Go to the transaction's docs, or to the Unassigned page.
2. Hover over the doc's name until the label appears.
3. Click the [Label], then choose to remove it.

The doc goes back to having no label, and drops out of any sort or search by that label.

Apply a Doc Label to Several Unassigned Docs

Label a batch in one pass — useful for splitting the assignment work across admins.

Who Can Do This: Admins, on unassigned docs in their locations. Agents, only on docs they uploaded.

To apply a doc label to several unassigned docs:

1. Click [Unassigned] from the top menu.
2. Check the box next to each doc you want to label.
3. Click [Bulk Label], then choose the label you want.

Every doc you checked picks up the label at once. Bulk labeling lives on the Unassigned page — inside a transaction, you label docs one at a time.

Sort a Transaction's Docs by Label

Group a transaction's documents by what you tagged them, without moving anything.

Who Can Do This: Anyone who can see the transaction's docs.

To sort a transaction's docs by label:

1. Open the transaction and scroll to the document list.
2. Click the [Label] column to sort the docs by their labels.
3. Click it again to sort in the reverse order.

Docs with the same label sit together. Unlabeled docs sit out of the sort and stay at the bottom of the list.

Frequently Asked Questions

How many doc labels can I have?

14. That's the full set, and it's the same for every account. When 14 isn't enough, some offices add an emoji to the doc name to code a doc beyond the labels.

Can I change the label colors?

No — the colors are fixed. You name each one, but there's no color picker and no way to add a color. If a color is hard for you to tell apart, choose the ones with the strongest contrast for the labels you use most, and tell us at help@paperlesspipeline.com — that feedback shapes what we build.

Can agents create their own doc labels?

No, admins name the labels. Agents can apply the labels that exist to docs they uploaded, up until an admin marks

the doc as Reviewed. After that, an admin makes label changes.

Why can a teammate label some docs but not others?

Labeling follows the same rule as editing a doc. An agent can label the docs they uploaded and assigned, and only while those docs are still unreviewed. Docs someone else uploaded, or that an admin has already reviewed, need an admin.

What's the difference between a doc label and a permission category?

A label organizes; a category controls who can see the doc. Permission categories are fixed and can't be renamed or added to, so when you want to group docs by type — disclosures, closing documents, leases — a label is the right tool.

Can I change labels on several docs at once?

Yes on the Unassigned page, no inside a transaction. From Unassigned, check the docs and use [Bulk Label]. On a transaction, docs are labeled one at a time.