Make Agents Name and Categorize Documents Your Way

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You can't take the wrong permission categories away from your agents. You can make the right one apply itself, by attaching it to the document's name.

Introduction

Two problems arrive together and have one answer. Documents come in named whatever the agent felt like that morning, and they come in filed under the wrong permission category: usually Private, occasionally Public, both of which mean somebody can't see something they need.

The first thing to accept is that you can't fix the second one by restriction. The permission categories can't be hidden, removed, or limited per agent, and there's no global default to set. That request comes up constantly and the answer hasn't moved.

What you can do is make the decision for them at the moment they name the document. A standardized document name can carry a permission category and a doc label with it, so an agent who picks the name from your list never chooses a category at all — and the problem stops happening at the source instead of being corrected downstream.

When to Use This

- Agents keep filing documents under the wrong permission category.
- You want to hide Private or Public from the category list and can't.
- The same form arrives with six different names depending on who uploaded it.
- An agent's list of remembered doc names disappeared when they switched computers.
- You want documents to sort in a set order on every transaction.

Why This Beats Correcting It Afterwards

Correcting categories after the fact is real work, and it's work that never ends — every new agent starts the cycle again, and the documents are wrong in the window between upload and correction, which is exactly when someone goes looking for them.

Presetting moves the decision to the person who actually knows the answer: you, once, when you build the list. The agent's job shrinks to picking the right name for the document in front of them, which is something they can do.

1. Accept That the Categories Can't Be Restricted

There's no way to remove a permission category, hide one from agents, or set an account-wide default. The set is fixed because it covers every combination of who-can-see-what, and each one is load-bearing for some office.

So don't spend the afternoon looking for that setting. The lever is naming, and everything below builds on it.

2. Build Your Office's Name List

Write down the documents your office actually handles and put them in as standardized names. Use the names your team says out loud rather than the formal titles on the forms — a name nobody recognises won't get picked.

Build a shared list of your company's document names, and everyone on your team names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

> Where the same form exists on both sides of a deal, make two entries — *Contract — Listing* and *Contract — Buyer* — so the name itself carries which side it belongs to, and the category follows.

3. Attach a Category and a Label to Each Name

This is the step that does the work. Each standardized name can carry a default permission category and a doc label, and both apply automatically when an agent picks the name — a few characters typed, the right name chosen, and the document is filed correctly without a category decision ever being made.

It also fixes a smaller annoyance you may not have connected: the suggestion list agents saw before this was their browser's own memory, so it vanished when they cleared their cache or moved to another computer. Standardized names live on the account and follow them everywhere.

4. Number the Names to Control the Sort

Documents sort alphabetically by name, and there's no drag-and-drop reordering. Prefix your standard names with numbers — *1 — Listing Agreement*, *2 — Agency Disclosure* — and every transaction in the office presents its paperwork in your order.

It only works if the numbering is in the standard names themselves, which is another argument for building the list properly rather than letting it grow one improvisation at a time.

5. Correct What Still Comes In Wrong

Standard names are suggestions, not rules — an agent can always type something else when nothing on the list fits. So a few will still arrive miscategorised, and the fastest correction is also the one that teaches: leave a comment on the document saying what to use next time.

Leave a note right on a doc and it travels with the document — your team sees it, the agent hears about it, and *Transaction History* keeps the record.

See Doc Comments