Organize a Transaction's Documents Into Your Own Buckets

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Pipeline has no folders inside a transaction. Doc Labels are the layer that does the same job: Contracts, Disclosures, Reports. They don't touch who can see anything.

Introduction

Open a transaction with forty documents on it and the wish is always the same: folders. Contracts here, disclosures there, reports in a third pile. Pipeline doesn't have them, and the first thing most offices reach for instead is the permission categories — which look like folders and are not.

Those categories decide who is allowed to open a document. Repurpose one as a folder and you've quietly changed who can see a whole class of paperwork, which is why support steers people away from it every time it comes up.

Doc Labels are the layer built for this. They're color-coded tags you name yourself, they apply to any doc anywhere in the account, and they have no effect on visibility at all. Sort by them and you get your buckets.

When to Use This

- You want folders inside a transaction — Contracts, Disclosures, Reports, Misc — and can't find them.
- You're about to ask whether a new document permission category can be added.
- Two contracts on one property need to stay visually separate from each other.
- Your doc list is long enough that finding one document means reading all of them.
- You want your document groupings to mirror the sections of your checklist.

Why This Beats Repurposing a Permission Category

The categories exist to answer one question — who can open this document — and the set is fixed because it already covers every combination of who. There's no room in it for *Closing* or *Referral* or *Trash*, and inventing one by using an existing category for that purpose changes visibility as a side effect that nobody will remember making.

A label changes nothing about access. It's a color and a word, visible to everyone who can already see the doc, sortable and searchable — organization with no permissions attached to it. That separation is the entire point.

1. Name the Labels for the Buckets You Actually Use

You get fourteen colors and you write what each one means. Name them for the groupings your office already talks about — *Contracts*, *Disclosures*, *Inspection*, *Closing* — rather than the ones a filing system might suggest.

Do this once, as a master admin, before anyone starts applying them. Renaming later is fine and every doc already wearing the label picks up the new name, but the color itself can't be changed after the fact, so pick colors that will still make sense when the list is full.

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

See Doc Labels

2. Apply Them Where the Docs Already Are

Labels go on from every place a document appears — inside the transaction, in the Unassigned queue, and on the Unreviewed page — so whoever touches a doc first can tag it without a detour.

The Unassigned queue is where this pays off, because you can check several docs and label the whole batch in one go. Inside a transaction it's one doc at a time.

> Agents can label the documents they uploaded themselves, up until an admin marks the doc Reviewed. After that, labelling is an admin job.

3. Group and Filter by Label

Two moves, and they answer different questions. Sorting the transaction's doc list by its Label column lines every bucket up together — that's your folder view. Typing a label's name into the transaction's **Search docs** box hides everything else, leaving only that bucket on screen.

Sorting is per person: the order you choose is remembered in your own browser and doesn't change what your teammates see.

4. Make the Right Label Apply Itself

Labels only organize if they get applied, and asking every agent to remember a fourteen-color scheme is optimistic. Attach the label to the document's *name* instead: a standardized doc name can carry both a label and a permission category, so choosing the name applies the whole bucket automatically.

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

See Standardized Document Names