

Standardized Document Names FAQ

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Standardized Document Names are a master-admin list of names your team picks from, each able to carry a preferred doc label and permission category. Answers to the common questions about who sets them up, what happens when a name is missing, and how far the list reaches.

Who can set up Standardized Document Names?

Master admins only. The list applies to every location on the account, so it's administered at the top. A location admin who needs a name added asks the account's master admin.

Do Standardized Document Names force agents to use them?

No — they're suggestions. Anyone can still type a name that isn't on the list when no standard name fits the doc. There's no setting that limits naming to the dropdown.

Why isn't a name showing up when I go to name a doc?

It hasn't been added to the list yet. Suggestions come from your account's Standardized Document Names. Ask a master admin to add the name under [Document Names] in the admin settings, and it appears from then on. If you have a long list, type a few letters to filter it down.

Can a standard name set the permission category for me?

Yes — that's what the Default Permission Category is for. Set it once on the name, and every doc given that name lands in the right category automatically. It's the closest thing to a default category in Pipeline, and it's the fix support recommends when agents keep picking the wrong one.

Can each office have its own list of document names?

No — one list covers the whole account. Names can't be split by location. If your offices need different forms, prefix the names so each office can spot its own quickly (for example, `CA - Seller Disclosure`).

Can I delete several document names at once?

No, they come off one at a time. Deleting a name also clears the Default Permission Category attached to it, so re-adding a name means setting its category again.

Do standardized names replace the names Pipeline used to suggest?

Yes. The list is stored on your account rather than in your browser, so it takes the place of the names your browser remembered you typing. The upside is that the same suggestions follow you to any device you sign in from.

Learn More

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](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
