Standardized Document Names

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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.

Introduction

Your office handles the same forms on every deal: the listing agreement, the seller's disclosure, the purchase agreement. Standardized Document Names let you set the name for each one once, for the whole company. From then on, anyone who uploads, assigns or renames a doc is offered your list. They type a few letters, pick the name that pops up, and go.

Each name can also carry a doc label and a permission category. Pick the name and Pipeline applies both, so a seller's disclosure gets your label and lands in the category that decides who can see it, without anyone setting either one by hand.

You don't have to start the list from nothing. Pipeline suggests names your team already uses on transactions, along with the label and category those docs were filed under, so the list is built from how your office already names things.

How It Works

One list, kept in your account settings, feeding every place a doc gets named.

Where the List Lives

The list sits in your admin settings under **Document Names**. Only master admins can add to it or change it, because it applies across every location on the account.

What a Standard Name Carries

A standard name can hold a pre-set **Document Label** and a **Default Permission Category**. Apply the name to a doc and Pipeline applies both automatically, so nobody has to remember which category a disclosure belongs in.

Where Your Team Sees It

The names come up whenever someone uploads, assigns, renames, merges, or breaks apart a doc. Start typing and the list filters down to what matches.

Names That Match Your Checklist

When a doc's name appears in a checklist task's name, Pipeline links the two on the transaction. Click either one and the other is highlighted, so you can spot it at a glance.

Names Your Team Already Uses

Pipeline watches the doc names your team puts on transactions. When the same name shows up on enough of your

recent transactions (at least three, and more for busier offices), it's suggested in a *Suggested from your documents* box above your list, along with the doc label and permission category those docs were filed under. Suggestions are updated weekly.

Add a Standardized Document Name

Add one name at a time to your company's list.

Who Can Do This: Master admins.

To add a document name:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the *Customize* section of the left menu, click [Document Names].
3. Click [Add Doc Name].
4. Enter the document name.
5. Click [Add Doc Name].

The new name joins the list and comes up the next time someone names a doc.

Next, pre-set a label and permission category on any name that should always carry them.

Paste In a List of Document Names

Add up to 50 names at once, the fastest way to build the list from scratch.

Who Can Do This: Master admins.

To paste in a list of document names:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the *Customize* section of the left menu, click [Document Names].
3. Click [+ Bulk add doc names].
4. Paste or type up to 50 document names, one name per line. Names already on your list are skipped.
5. Click [Preview Doc Names], then review the list.
6. Click [Add Doc Names].

Every new name appears in the list, ready to use.

Next, pre-set a label and permission category on any name that should always carry them.

Review Suggested Document Names

Add or discard the names Pipeline suggests from your team's documents.

Who Can Do This: Master admins.

To review suggested document names:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the *Customize* section of the left menu, click [Document Names].
3. Under *Suggested from your documents*, check the names you want to act on. Every name starts out checked.
4. Click [Add checked doc names] to add them to your list, or [Discard checked suggestions] to stop them from being suggested.

Added names join your list, each with its permission category. Discarded names won't be suggested again.

Next, pre-set a label and permission category on any name that should always carry them.

Not quite the name you want to standardize on? Add it, then edit the name, or add your own.

Pre-set a Label and Permission Category

Give a name the label and category every doc of that name should carry.

Who Can Do This: Master admins.

To pre-set a label and permission category:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the *Customize* section of the left menu, click [Document Names].
3. Find the name in your list.
4. To set its doc label, click the label icon to the left of the name and choose a label.
5. To set its permission category, click the [Gear] to the right of the name, then [Edit]. Choose a **Default Permission Category** and click [Save].

The label shows beside the name and the category in its column. Every doc given that name from now on picks up both.

See Doc Labels and Permission Category.

Edit a Document Name

Change a name on your list when the form it stands for is renamed or updated.

Who Can Do This: Master admins.

To edit a document name:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the *Customize* section of the left menu, click [Document Names].
3. To the right of the name, click the [Gear], then [Edit].
4. Update the **Doc Name**.
5. Click [Save].

The updated name appears in the list and comes up the next time someone names a doc.

Rename a Doc

Change a doc's name right where it sits, on a transaction or in *Unassigned Docs*. Your standard names come up while you type.

Who Can Do This: Admins, on any doc. Agents, only on docs they uploaded, and only until an admin assigns the doc or marks it as Reviewed.

To rename a doc:

1. Hover over the doc on the transaction or in *Unassigned Docs*.
2. Click the pencil.
3. Type the new name, or pick one of your standard names.
4. Click [Save], or press `Enter`.

The doc carries its new name everywhere it appears. Give a doc one of your standard names in *Unassigned Docs*, and its doc label and permission category are applied when you assign it.

No pencil? An admin has already assigned or reviewed that doc, so an admin needs to make the change.

Frequently Asked Questions

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.

Can a standard name set the permission category for me?

Yes. Set a Default Permission Category once on the name, and every doc given that name lands in the right category automatically. It's the fix we recommend when agents keep picking the wrong one.

Can each location have its own list of document names?

No. One list covers the whole account. If your offices need different forms, prefix the names so each office can spot its own quickly (for example, `CA - Seller Disclosure`).