

Standardized Document Names

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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.

Introduction

The same form arrives named six different ways: *Purchase Agreement*, *purch agmt*, *PA-signed*, *Contract FINAL*. Each one is findable by the person who typed it and nobody else, and none of them tells a reviewer what they're actually looking at.

Standardized document names fix that at the moment of naming. You build the list once for the company, covering the forms your offices handle every day, and from then on those names come up as suggestions wherever someone names a doc. Each name can carry two more decisions with it: the doc label you want on that document, and the permission category that decides who can see it. Your agent picks the name, and the filing that used to happen afterwards happens right there instead.

The payoff is a company where one form is called one thing, which is what makes a document findable by search, sortable by label, and obvious to whoever reviews it. The list stays a set of suggestions rather than a rule. When a document doesn't match anything on it, anyone can still type the name that fits.

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 appear as suggestions whenever someone uploads, assigns, renames, merges, or breaks apart a doc. Start typing and the list filters down to what matches.

Suggestions, Not Rules

The list suggests; it never requires. Someone can still enter a different name when no standard name applies to the doc in front of them.

They Follow You Between Devices

The list lives on your account, so it replaces your browser's own memory of names you've typed before. The same

names are there on any computer you sign in from.

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 standardized 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 starts appearing as a suggestion the next time someone names a doc.

Add a List of Standardized Document Names

Paste in up to 50 names at once — the fastest way to build the list from scratch.

Who Can Do This: Master admins.

To add a list of standardized 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 ignored.
5. Click [Preview Doc Names], then review the list.
6. Click [Add Doc Names].

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

Edit a Standardized Document Name

Fix a name or change its default permission category without starting over.

Who Can Do This: Master admins.

To edit a standardized 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** or the **Default Permission Category**.
5. Click [Save].

The updated name appears in the list.

Pre-set a Doc Label for a Document Name

Tie a color-coded label to a standard name so Pipeline applies it every time someone uses that name.

Who Can Do This: Master admins.

To pre-set a doc label for 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. Hover over a doc name until the label icon appears.
4. Click the [Label] icon and choose the label you want.

From now on, any doc given that name picks up the label automatically.

Pre-set a Permission Category for a Document Name

Set the category that decides who can see a doc, once, on the name itself.

Who Can Do This: Master admins.

To pre-set a permission category for 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. In the **Default Permission Category** column, choose the category you want.
5. Click [Save].

Whenever someone applies that name to a doc, the category comes with it — no manual selection, and no more disclosures landing where agents can see them.

Rename a Doc

Change a doc's name from the transaction it's sitting on. Your standard names appear as suggestions 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. Open the transaction.
2. Click the [Gear] to the right of the doc, then [Edit Doc].
3. Change the **Doc Name**.
4. Click [Save].

The doc carries its new name everywhere it appears. No [Edit Doc] option? An admin has already assigned or reviewed that doc, so an admin needs to make the change.

Standardized Document Names FAQ

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. See [Standardized Document Names FAQ](#).
