

# 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 set.

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

Standardized document names fix that at the moment of naming. You build the list once for the company, covering the forms your office handles every day, and from then on, those names are automatically suggested 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.

You don't have to start from a blank page, either. Pipeline suggests names from the ones your team already uses, so the list can be easily built for how your office really 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 or change it, because it applies across every location in 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. Use the same names in your checklist tasks, and each doc named from the list highlights its matching task on the transaction.

## Names Your Team Already Uses

Pipeline watches the doc names your team puts on transactions. When the same name shows up on three or more transactions in the last 90 days, it's suggested under *Suggested from your documents*, along with the permission category those docs were filed under. Names already on your list are never suggested again.

## A Guide, Not a Rule

The list guides naming but never requires it. Someone can still enter a different name when no standard name

applies to a doc.



Turn the names your team already uses into standard names, category and all.



**Who Can Do This:** Master admins.

To add suggested doc 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*, uncheck any name you don't want. Every name starts checked.
- 4 Click [Add checked doc names].

The checked names join your list with their permission category already set. Unchecked names are removed from the suggestions for good. To add one later, use [Add Doc Name]. To clear every suggestion without adding any, click [Discard all suggestions].



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 comes up the next time someone names a doc.



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.



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 **Default Permission Category**.
- 5 Click [Save].

The updated name or category appears in the list.

Tie a color-coded label to a standard name so Pipeline applies it every time someone uses that name. [Learn more about Doc Labels →](#)



**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.



Set the category that decides who can see a doc, once, on the name itself. [Learn more about Permission Categories →](#)



**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.



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 Change the **Doc Name**, or pick one of your standard names.
- 4 Click [Save].

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.



## 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.** 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.** Ask a master admin to add the name under [Document Names] in the admin settings, and it comes up from then on. If you have a long list, type a few letters to filter it down.

## Why isn't a name we use all the time being suggested?

**It hasn't met the bar yet, or it's already on your list.** A name is suggested once it's been used on three or more transactions in the last 90 days, and it appears after Pipeline's next update of the suggestions.

## 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 support recommends when agents keep picking the wrong one.