Reference Library & Forms FAQ

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Admins build the Reference library, everyone in the account can use it, and a deleted reference doc doesn't come back. Answers to the common questions about what you can store, who can see it, and how it's organized.

Does Pipeline come with state or MLS forms built in?

No. There's no built-in forms library and no sync with your state association, board, or MLS. The *Reference* page is the place to put the forms your brokerage uses, and keeping them current is on your office.

Who can add docs and links to the Reference page?

Admins only. Everyone in the account can see the page and open what's on it, but adding, editing, and deleting are admin actions. If an agent tries, the upload looks like it worked and nothing saves.

Is there a limit on how many docs we can store?

No. Add as many docs and links as your office needs. The one practical ceiling is per category: once a single category holds 60 or more docs, you can no longer drag them into order and Pipeline sorts them alphanumerically instead.

Can I hide some reference docs from agents?

No — the *Reference* page is account-wide by design. Admins who need admin-only material usually keep it on a dedicated transaction with no agents added, since agents can't see transactions they aren't on.

Can each location have its own reference docs?

Not on the *Reference* page. It was built as one shared library for the whole account. Offices that need this create a transaction per location, named for that location, add only that location's agents, and upload the location's material into a doc permission category those agents can view. Admins with View All Transactions don't need to be added.

Can I create subfolders inside a Reference category?

No — categories don't nest. The usual workaround is to build the hierarchy into the names, like *Office Forms - Buying* and *Office Forms - HR*, so related categories group together in the list.

How do I create a new Reference category?

Type the name into the category dropdown while you're adding a doc or link. There's no separate screen for creating categories first — the category is made when you save the item.

How do I delete a whole category at once?

There's no single delete action. Move or delete everything filed under the category, then refresh the page — the empty category stops appearing.

Why did my category disappear when I moved the last doc out of it?

That's how categories work. A category exists because something is filed under it, so emptying one removes it. Refile a doc or link under that name and the category comes right back.

Can I recover a reference doc I deleted?

No. Docs deleted from a transaction or from *Unassigned* can be recovered; reference docs can't. You'll need the original file to upload it again.

Do fillable PDFs stay fillable after I upload them?

Yes. A fillable PDF keeps its form fields. Agents download it and fill it in Adobe Acrobat or Reader as usual.

Can I maildrop docs into the Reference page?

No. Maildrop addresses route to *Unassigned* or to a specific transaction. Reference docs go in by upload.

Can I put a reference doc straight onto a transaction?

Not directly. The usual route is to email the doc to that transaction's maildrop address — it lands on *Unassigned* and you assign it from there in a couple of clicks.

Can I link to our MLS or association forms page?

You can add it, but it won't open for anyone without that site's login. Portals like FMLS or GAMLS require their own member credentials, so agents hit a sign-in wall. For those forms, store the actual files on the *Reference* page and replace them when new versions come out.

Can I put a training video on the Reference page?

Yes — as a link, not an upload. Post the video somewhere that hosts it (an unlisted YouTube video is the usual choice), then add that address as a reference link. It plays more reliably across devices than a hosted video file would.

Can I link to a Google Sheet or a shared spreadsheet?

Yes. Store the address as a reference link and it's available account-wide. If the material only matters to certain transactions, a task with the link in it keeps it scoped to those transactions instead.

Do links get filed under categories like docs do?

Yes — the same categories. You pick a category when you add the link, and you can mix links and docs in one category so a form and the video about it sit together.

Can someone without a Pipeline login see our reference docs?

No. The *Reference* page is only reachable by users in your account, and there's no public link to it. To get a doc or an address to an outside party, email it to them from the *Reference* page.

Why do our reference docs show up inside a transaction?

So you can attach them to an email without uploading a blank copy first.They appear only while *Note / Email* is open, listed below Transaction Docs. They aren't attached to the transaction and never count as its own documents.

Can I turn the Reference Docs section off for my office?

No — there's no per-office setting for it. What you can do is collapse it: click [-] next to the *Reference Docs* header inside Note / Email, and it stays collapsed until you expand it again.

Do I have to use the categories that are already there?

No. Type any name you want into the category dropdown and Pipeline creates it. Most offices name categories after how their agents think — by transaction phase, by form type, or by audience.

Learn More

Your company's Reference page is the shared library — the blank forms, disclosures, training material, and links an admin posts once so nobody on the team has to hunt for them.

See [Reference Library & Forms]

Still Have Questions?

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