Reference Library & Forms

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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.

Introduction

Every brokerage has the same small pile nobody should have to hunt for: the blank listing agreement, the state disclosures, the office policy handbook, the W-9, last quarter's training recording, the link to your board's forms page. Usually it lives on a shared drive half the office can't reach, or in an email from March.

The Reference page is where that pile goes instead. A doc gets posted once and filed under a category, and from that moment everybody in the account can open it, download it, or send it out. Links sit beside documents, so a training video or an outside forms site belongs here as much as a PDF does, and there's room for as much as your office actually keeps.

Build it once and it answers the question your agents ask most, which is where do I find our forms. One expectation is worth resetting first: Pipeline doesn't arrive with your state's blank forms inside it, and there's no sync to your association's library. What's on this page is what your office put there, which is also why it's always the version your office wants signed.

How It Works

What Goes on the Reference Page

The blank and the evergreen — forms your agents fill out fresh each time, state disclosures, office policies, training handouts. Anything tied to a specific deal belongs on that transaction instead.

What you post	How it gets there
Documents	Uploaded from your computer. A fillable PDF keeps its form fields.
Web pages and outside forms sites	Added as a reference link — a name and an address. Pipeline stores the address, not access, so a site with its own login still asks agents to sign in.
Video	Hosted elsewhere, an unlisted YouTube video being the common choice, and added as a link.

How the Page Is Organized

Every doc and link is filed under a category you name yourself — *Listing Forms*, *Buyer Forms*, *Training* — and docs and links share the same categories. Categories don't nest, so admins who want a hierarchy build it into the names: *Office Forms - Buying*, *Office Forms - HR*. There's one library, and it's shared account-wide.

What Happens Once It's Posted

Everyone in the account can open, download, and email anything on the page. Your reference docs also travel: open a transaction's **Note / Email** and they're listed as an expandable section below Transaction Docs, ready to attach without uploading a blank copy first. They never count as that transaction's own documents. Click **[-]** beside the *Reference Docs* header to collapse the section, and it stays collapsed until you expand it again. Removing an item removes it for everyone, and a reference doc has no recovery path.

Add a Reference Doc

> Upload a document to the *Reference* page so your team can get to it any time.

> **Who Can Do This**: Admins.

To add a reference doc:

1. Click [Reference] from the top menu.
2. Click [Add Docs] at the top of the page.
3. Choose the docs to upload by dragging them from your computer into the blue box, or by clicking the blue box to select them.
4. Name each doc by entering its **Doc Name**.
5. Categorize each doc by clicking [- Choose a category -] and selecting an existing category, or typing a new one.
6. Click [Upload Docs].

The docs appear under their categories on the *Reference* page, where agents and admins can view, download, and email them.

Add a Reference Link

> Add a web address to the *Reference* page so your team can reach it from inside Pipeline.

> **Who Can Do This**: Admins.

To add a reference link:

1. Click [Reference] from the top menu.
2. Click [⍰ Add Link] at the top of the page.
3. Name the link by entering the **Link Name**.
4. Enter the **Link URL**.
5. Categorize the link by clicking [- Select a category -] and choosing an existing category, or typing a new one.
6. Click [Add Link].

The link appears under its category on the *Reference* page, where agents and admins can open and email it.

Add a Reference Category

> Create a category as you file the first doc or link into it — type the name you want and it's made for you.

> **Who Can Do This**: Admins.

To add a reference category:

1. Click [Reference] from the top menu.
2. Click [⍰ Add Docs] or [⍰ Add Link] at the top of the page.
3. Choose the doc you want to upload, or enter the link's **Link Name** and **Link URL**.
4. Click the [- Choose a category -] dropdown and type the name of your new category into the box.
5. Click [Upload Docs] or [Add Link].

The new category appears on the *Reference* page with your doc or link inside it, and it's waiting in the dropdown the next time you file something. There's no separate screen for building categories first.

Edit a Reference Doc

Rename a reference doc or move it to a different category. The file itself doesn't change.

Who Can Do This: Admins.

To edit a reference doc:

1. Click [Reference] from the top menu.
2. Click [⚙] to the right of the doc you want to change, then [Edit Doc].
3. Update the doc's **Name** or **Category**.
4. Click [Save].

The doc keeps its file and its comments, and moves to the category you chose.

Edit a Reference Link

Change a link's name, its address, or the category it's filed under.

Who Can Do This: Admins.

To edit a reference link:

1. Click [Reference] from the top menu.
2. Click [⚙] to the right of the link you want to change, then [Edit Link].
3. Update the link's **Name**, **URL**, or **Category**.
4. Click [Save].

Everyone gets the updated address the next time they open it — worth doing the moment a destination moves, since a stale link is worse than none.

Rename a Reference Category

> Change a category's name from the *Reference* page. Everything filed under it stays where it is.

> **Who Can Do This**: Admins.

To rename a reference category:

1. Click [Reference] from the top menu.
2. Click [the pencil icon] to the right of the category you want to change.
3. Enter the new name for the category.
4. Click [Save].

The category keeps every doc and link filed under it, and shows its new name to everyone in your account.

Reorder Reference Docs and Links

> Drag items into the order you want them read within a category.

> **Who Can Do This**: Admins.

To reorder reference docs and links:

1. Click [Reference] from the top menu.
2. Click a doc or link, then hold and drag it.
3. Drop it into its new position within the category.

The order you set is the order everyone sees. Dragging works within a category, not across categories — and once a category holds 60 or more docs, Pipeline pages and sorts them alphanumerically instead.

Comment on a Reference Doc or Link

> Add a note to a reference item — when to use it, what changed, which version it is — and everyone sees it

alongside the doc.

Who Can Do This: Admins.

To comment on a reference doc or link:

1. Click [Reference] from the top menu.
2. Click [the comment icon] next to the item you want to comment on.
3. Add a new comment in the yellow comment box, or click [the edit icon] to change an existing one.
4. Click [Save].

Agents and admins see the comment whenever they view that item on the *Reference* page.

Delete a Reference Doc or Link

Remove an item your team no longer needs from the *Reference* page.

Who Can Do This: Admins with permission to delete any docs.

To delete a reference doc or link:

1. Click [Reference] from the top menu.
2. Click [⚙] to the right of the item you want to remove, then [Delete].
3. Click [Delete] again to confirm.

The item is gone for everyone. A deleted doc can't be undone — if there's any chance you'll want it back, download a copy first. Deleting a link removes only the address; nothing happens to the page it pointed at.

Delete Multiple Reference Docs and Links

Clear out several docs and links — or a whole category's worth — in one pass.

> **Who Can Do This**: Admins with permission to view all transactions and to delete any docs.

To delete multiple reference docs and links:

1. Click [Reference] from the top menu.
2. Check the box beside each doc or link you want to remove, or check an entire category.
3. Click [Delete Docs] at the top of the page.
4. Click [Delete] again to confirm.

Everything you checked is removed for everyone in the account, and none of it can be recovered. This is the fastest way to retire a year of outdated forms — and the fastest way to lose something you meant to keep, so download anything you're unsure about first.

Remove a Reference Category

> There's no delete button for a category. Empty it and it goes away on its own.

> **Who Can Do This**: Admins. Deleting the docs inside also requires permission to delete any docs.

To remove a reference category:

1. Click [Reference] from the top menu.
2. Move every doc and link out of the category, or delete them. To move one, click [⚙] to its right, then [Edit Doc] or [Edit Link], and choose a different category.
3. Refresh the page.

The empty category stops appearing. Move anything you still want to keep before you start deleting — a deleted reference doc can't be recovered.

Give One Office Its Own Set of Forms

The workaround for a library that can't be split by office runs through a transaction: one per location, only that location's agents added to it, that location's material uploaded there instead. What keeps everybody else out is the permission category you file it under, so that's the part worth getting right.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

Reference Library & Forms FAQ

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.

See Reference Library & Forms FAQ

Reference Library & Forms Troubleshooting

Something on the page not behaving? Start here.

- Your Reference Page Isn't Showing What You Expect