Set Up Your Office's Reference Library

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Your blank forms, your policy documents, your training videos — posted once by an admin and reachable by everyone, without a shared drive and without a link nobody can find.

Introduction

Every office has a folder somewhere holding the things agents need constantly and can never locate: the office listing agreement, the commission policy, the new-agent packet, last quarter's training recording. Usually it's a Google Drive nobody has permission to, or an email from March.

Reference is the version of that folder that lives where the work already happens. An admin posts a document or a link, gives it a category, and every user on the account can open it from the top menu. From the office, from a phone, from a closing table.

The part that decides whether this works long-term isn't the setup, which takes an afternoon. It's what you decide to put there. Get that boundary right and Reference stays useful for years; get it wrong and you've built a second version-control problem.

When to Use This

- Agents keep asking where to find a blank form, and you keep emailing it to them.
- Your office forms live in Google Drive or Dropbox and half the team can't get to them.
- You want new agents to have the onboarding packet and the training videos in one place.
- You're setting up a new Pipeline account and want the shared material in before the agents arrive.
- A recording is too big to email and you want it somewhere permanent.

Why This Beats a Shared Drive

A shared drive is one more place to be given access to, one more password, one more app on the phone. Half your agents will have it and half won't, and the ones who don't will ask you — which means you're still the distribution mechanism, only now with an extra step in the middle.

Reference is inside the tool they already open to do the work, and everyone on the account already has access by definition. Nothing to grant, nothing to remember, and the same list from any device.

1. Decide What Belongs There

Store **your brokerage's own** documents: your listing and buyer agreements, your commission and policy documents, your onboarding material, your training recordings, your office-specific disclosures.

Leave state, MLS and association forms where they already live — in zipForms, TransactionDesk, or whatever your agents use to fill and sign them. Those forms are revised on somebody else's schedule, and copying them into Reference means you've promised to keep up with revisions you don't control and can't see. Most offices that tried it ended up with agents using an outdated version of a form the platform had already replaced.

> The test is simple: if your brokerage decides when this document changes, it belongs in Reference. If someone else does, link your agents to where it lives instead.

2. Post the Documents

Adding to Reference is an admin job, and it's one screen: open Reference from the top menu and add the doc. Everyone on the account can open and download what you post from that moment on.

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

3. Group Them With Your Own Categories

Reference categories aren't a fixed list you pick from — you write them. When you're adding a doc or a link, type the category name you want instead of choosing an existing one, and Pipeline creates it.

There's no nesting, so plan for one flat level. Categories display alphabetically, which you can use: name related ones with a shared prefix — *Office Forms — Buying*, *Office Forms — Listing*, *Office Forms — HR* — and they sit together in the list even without a folder to hold them.

4. Handle Video and Anything Large

A single Reference file caps at 100MB, which most training recordings blow straight past. Rather than splitting the video, upload it to YouTube or Vimeo and post it as a Reference **link** — links have no size limit at all, and your agents get a proper player instead of a download.

The same trick covers anything that lives better elsewhere: a live spreadsheet, a scheduling page, your carrier's portal. Post the link and it sits in the list beside the documents.

5. Keep the List Current

Nothing in Pipeline tracks versions of a Reference doc or tells you when one goes stale, so this stays a human job — and the offices that do it well make it a calendared one rather than a reactive one. Licence documents at renewal, policy documents at the start of the year, onboarding material whenever the process changes.

When you replace a form, take the old one down in the same pass. An outdated form nobody removed is worse than no form at all, because an agent will use it in good faith.

The Reference page lists every doc and link your office has posted, grouped into categories — browse it, search it by name, and take what you need without leaving Pipeline.

See Reference List