Your Reference Page Isn't Showing What You Expect

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A category that's cut off, gone, or refusing to reorder is almost always doing exactly what it was built to do. Here's what's behind each one.

A Category Name Is Cut Off or Missing

Long category names get truncated on smaller screens and narrower browser windows, so a name that reads fine on your monitor can be clipped — or effectively invisible — on someone else's laptop.

To fix it:

1. Click [Reference] from the top menu.
2. Click [+] to expand the category, then click [⚙] to the right of one of its docs and choose [Edit Doc].
3. Open the category dropdown and enter a shorter name.
4. Click [Save], then repeat for the other items in that category.

Keep category names short and put the detail in the document names instead — that's what stays readable at every screen size.

Docs Won't Drag Into a New Order

Drag-and-drop ordering works up to a point. Once a category holds 60 or more docs, Pipeline pages them 25 at a time and sorts them alphanumerically instead, and dragging is no longer available. This is a design limit, not a fault in your account.

Two ways around it:

- **Split the category** into smaller ones, each under 60 items, and drag-and-drop comes back.
- **Put the order in the names.** Prefix doc names so alphanumeric sorting produces the sequence you want — `01 -`, `02 -` for a fixed order, or a `YYYY.MM.DD` date prefix for oldest-to-newest.

A Category Disappeared

Categories aren't stored on their own — one exists because docs or links are filed under it. Delete the last item in a category, or move it somewhere else, and the category goes with it. Nothing is broken and nothing else was lost.

To bring it back, file a doc or link under that name again: add or edit an item, type the category name into the dropdown, and save.

> **Heads up**: a reference doc that was deleted rather than moved can't be recovered. You'll need the original

> file to put it back.

An Empty Category Is Still Showing

The category list is drawn when the page loads, so a category you just emptied can linger until the page is redrawn. Refresh the *Reference* page and it clears.

Reference Docs Are Showing on the Transaction Itself

Reference docs belong on the *Reference* page, and inside a transaction they appear in exactly one place: the expandable list inside **Note / Email**, so you can attach one to a message. If you're seeing them anywhere else on a transaction — in the transaction's own document list, or at the bottom of the file — your browser is showing you a cached copy of the page.

To clear it:

1. Do a **hard refresh** — `Ctrl+Shift+R` on Windows, `Cmd+Shift+R` on a Mac.
2. If it persists, clear your browser's cache so it re-downloads the latest files.

Once the page redraws, reference docs show only inside Note / Email. There's no setting that turns that section off for an office, but you can click **[-]** next to the *Reference Docs* header to collapse it — it stays collapsed until you expand it again.

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?

Still stuck after all of the above? Email us at help@paperlesspipeline.com — a screenshot of the *Reference* page helps us see what you're seeing.