Transaction Naming Instructions

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Show your team a naming reminder right under the transaction name field, so files are named your way every time.

Introduction

Ask five people to name a file after the same house and you get five names. Unit numbers in three different places, the city sometimes there and sometimes not, and a Transactions list that only sorts properly by accident.

The fix that works isn't a memo. It's a line of your own text sitting under the name field at the moment somebody is typing a name, saying how your office does it. You write it once for the company, and it turns up wherever a transaction gets named, which is the only moment anyone would read it.

So the convention lives where the decision happens instead of in a document nobody opens twice. It's a prompt rather than a rule, and that's the honest trade: nothing is rejected for being named the wrong way, so an off-pattern name still saves. Most people read it and get it right, and a list where most of the names match is a list you can actually sort.

How It Works

You write the message once, it shows up wherever a transaction is named, and it guides rather than enforces.

Where It Appears

Your instructions display in red, just under the transaction name field, whenever someone creates or edits a transaction.

It Guides, It Doesn't Enforce

The message is a reminder, not a rule. Pipeline won't block or reject a name that doesn't match your format — the text keeps your convention in front of your team so they follow it by habit.

Edit the Naming Instructions

> Add or update your custom help text from your company settings.

> **Who Can Do This**: The master admin.

To edit the naming instructions:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Fill in or edit the transaction name instructions field with your own help text.

3. Click [Save].

Your message now appears in red under the transaction name field the next time anyone adds or edits a transaction.