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.