Name Your Documents So the Checklist Finds Them

Last Modified on 11/10/2026 12:20 pm EST

Give a doc the name its checklist task already uses, and Pipeline points each one at the other. Hover a task to find its doc, click a doc to find its task.

Introduction

A file comes up for final review with every task checked and dozens of documents on it. Each checked task means a document is somewhere in that list, and your job is to open the right one and look at it. On a busy file, most of that time goes to finding the doc, not reading it.

Pipeline can do the finding, and it does it by name. When a doc's name sits inside a task's name, the two are a pair. Hover over the task and the doc lights up. Click the doc and the task lights up. There's no link to set and nothing to attach. The names are the link.

So the work is all in the naming, and most of it happens once. You take the task names you already wrote into your checklist templates, trim them down to the documents themselves, and load them as your office's standard names. From then on, every doc named from that list finds its task on every transaction. The one habit that takes ongoing care is keeping the final version of a doc on the standard name when a corrected copy comes in.

When to Use This

- You want to attach a document to the checklist item it satisfies, and there's no attach button.
- You'd like a task to check itself off when its doc is uploaded or reviewed, and it won't.
- You're reviewing a closed file and scrolling the doc list to find the document behind each checked task.
- A corrected copy of a doc came in and you can't tell at a glance which version is the final one.
- Your doc list started folding versions into groups and you want the checklist pointing at the right one.

1. Let the Task and the Doc Find Each Other

The match runs one way: the doc's name has to be contained in the task's name. A task called Review HOA Documents matches a doc called HOA Documents. A doc called HOA Docs matches nothing, because HOA Docs isn't inside the task name. Every word of the doc name has to be there, in the same order.

Once the names line up, the highlighting works in both directions. Hover over a task on the checklist and the matching doc highlights in the doc list, which is the move for the broker or admin doing a final review. Click a doc and the matching task highlights, which is the move for whoever is checking tasks off as documents arrive. The highlight never checks a task for you. You still check it off yourself.

The tasks on a checklist are the documents to collect and the steps to finish on a transaction.

See Document Names or Tasks to Track

The same move sits alongside saved searches and keyboard shortcuts in Work Pipeline Like a Power User.

2. Pull Your Task Names Out of the Checklist Template

You already typed the names of every document your office requires, as tasks on your checklist templates. Don't type them again. Download the template that holds your required documents, often the pending or under-contract checklist, and the CSV gives you every task in order in one column you can copy.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

3. Trim Each Name to the Document Itself

Task names carry words that aren't part of the document's name: Review, Upload, Signed by all parties, (if applicable). Before you paste the list anywhere, cut each line down to the name of the document alone.

The trimmed name is still inside the full task name, so it still matches. The task keeps its extra words and the doc name stays clean:

- **Task:** Seller's Disclosure Notice (if applicable) · **Standard name:** Seller's Disclosure Notice
- **Task:** Review HOA Documents · **Standard name:** HOA Documents
- **Task:** Fully Executed Contract, signed by all parties · **Standard name:** Fully Executed Contract

Check each trimmed name against its task word for word. An abbreviation on one side and not the other, like Contract on the task and Agmt on the name, breaks the match.

4. Load the Names in One Paste

A master admin can paste up to 50 names at once from Document Names in the admin settings. Names already on your list are skipped, so pasting a list that overlaps your current one does no harm. Once the names are in, attach a doc label and a default permission category to each one, so the name an agent picks also files the doc.

Build a shared list of your company's document names, and everyone on your team names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

The list keeps working in both directions after the first paste. Your standard names come up as suggestions when you name a doc and when you type a new task into a checklist template, so tasks you add later match without extra care. Type a Few Letters Instead of Scrolling covers both. Attaching the category to the name is its own job, set out in Make Agents Name and Categorize Documents Your Way.

5. Keep the Final Version on the Standard Name

Two docs on a transaction can share a name. When a second one arrives with a name already in use, Pipeline adds a version number, so a corrected contract uploaded under the same name lands as Fully Executed Contract (2).

That version number matters to the checklist. Fully Executed Contract (2) isn't inside the task name Fully Executed Contract, so the task keeps pointing at the copy with the missing signature while the group shows the corrected one. The fix is to rename the outdated copy before the corrected one arrives.

To keep the final version on the standard name when a doc comes back for a fix:

1. Leave a comment on the doc saying exactly what's missing, such as Missing signature on page 1.
2. Click the doc's [Gear], then [Edit Doc].
3. Add the problem in parentheses after the name, so Fully Executed Contract becomes Fully Executed Contract (Missing Signature).
4. Click [Save].

The old copy stays on the file with its comment and no longer matches the task. When the agent uploads the signed version as Fully Executed Contract, it takes the plain name and is the doc the task highlights. If the corrected copy already landed as Fully Executed Contract (2), rename the old copy first, then take the (2) off the new one. The comment, the label, and leaving the doc unreviewed are all set out in Send a Document Back to the Agent for a Fix.

If your account turns away duplicate uploads, the corrected copy still goes through. Pipeline compares what's inside the file, and a new signature makes it a different document.

Switch on duplicate prevention and Pipeline checks every agent's upload against what's already on the transaction, so the same file can't land twice.

See Duplicate Doc Prevention

6. Sign Off on the Doc the Task Points At

At final review, work down the checklist rather than the doc list. Hover over each checked task, open the doc that lights up, and read it. When it's right, mark the doc reviewed and move to the next task.

You sign off on a doc by checking Reviewed — that clears it from the queue, locks it against edits, and records who reviewed it and when.

See Doc Review

A task name can contain more than one of your standard names, and then more than one doc lights up. A doc label on the final version tells them apart at a glance.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See Doc Labels