Reference

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Your office's shared library: the blank forms, disclosures, training material, and links an admin posts once, and the same current copy for everyone who opens the page.

Introduction

An admin posts a document or a link to the Reference page and everyone in the account finds it there, grouped into the categories the admins set up. Nobody keeps a personal copy, so nobody works from a stale one.

From the page you can find a form, take a copy, or send it straight out of Pipeline, and a form sent from here leaves a record that it was sent.

The Library

What Admins Post Here

Blank forms, disclosures, training material, and links, organized into categories, posted once for the whole account.

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

Find, Take, and Send

Browse the categories, search by name, download a copy, or send a form out without leaving Pipeline.

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