

# Color-coded Custom Labels in Unassigned Docs

## SUMMARY

Learn how to use customized labels to distribute unassigned doc assignment responsibilities across multiple admins.

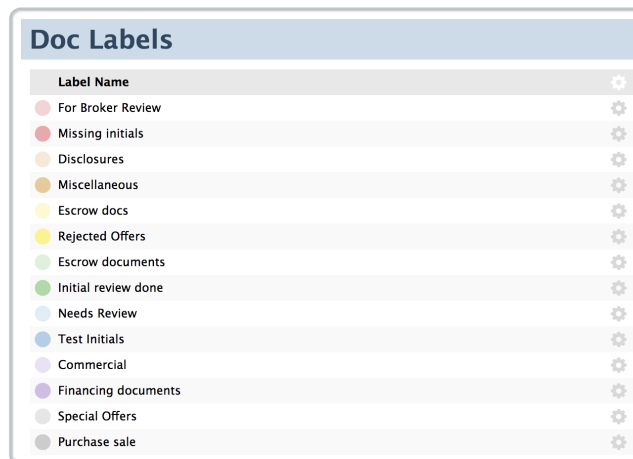
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## Define Custom Labels for Company Use

- 1 Click your name in the upper right corner then "Admin / Settings".
- 2 Click [Document Labels] from the left menu. On the Document Labels page, you will see uniquely colored label options available to you. Customize any label by highlighting and editing the label.
- 3 Enter user names, priorities, statuses, or anything else that fits your company's needs. You can use as many or as few labels as desired.



## Apply Labels

Admins will be able to apply the labels to any Unassigned Docs in their locations and agents will be able to apply them to their own docs.

- 1 From the Unassigned page, hover over a doc name until a label appears.
- 2 Click the label to select a desired custom label or to remove it.

The image shows a screenshot of a document management interface. At the top, there is a list of PDF files. The second file, "Keybox-authorization-by-tenant\_2.pdf", is highlighted in yellow and has a red box around its icon. Below the list, a "Select Label" dropdown menu is open, showing several options with colored circular markers. The options are: "For Broker Review" (pink), "Missing initials" (red), "Disclosures" (tan), "Miscellaneous" (brown), "Escrow docs" (light yellow), "Rejected Offers" (yellow), and "Escrow documents" (light green). The background shows the names of other PDF files, such as "Lead\_Based\_Paint\_Addendum\_to\_listing.pdf", "Buyer.pdf", "heet(1).pdf", "hase\_agreement.pdf", and "ain\_Street\_Columbia\_MO\_39...".

File Name	Label
Lead_Based_Paint_Addendum_to_listing.pdf	
Keybox-authorization-by-tenant_2.pdf	Rejected Offers
Lead_Based_Paint_Addendum_to_listing.pdf	
Keybox-authorization-by-tenant_.pdf	
Buyer.pdf	
heet(1).pdf	
hase_agreement.pdf	
ain_Street_Columbia_MO_39...	