Standardized Document Names

SUMMARY

Learn how to set up *Standardized Document Names. Standardized Document Names* help keep your company's docs organized, and help your admin and agents comply with your company's preferred *Document Names, Document Labels, and Permission Categories.*

IN THIS ARTICLE

Introduction Video I Who Can Do This? How To Navigate to the Document Names Area Add Standardized Document Names Single Document Name List of Document Names Edit Standardized Document Names Pre-set Document Labels for Document Names Pre-set Permission Categories for Document Names

RELATED PIPELINE PRO WEBINAR RECORDINGS

Standardized Document Names

Introduction

Standardized Document Names allow you to add a predefined list of your company's regularly used documents and forms, and pre-set your preferred *Document Label* and *Permission Category* for each doc. Once you've setup *Standardized Document Names*, anyone that works on docs in your company's account can take advantage of the benefits, including:

- When naming docs, select from a predefined list of *Standardized Document Names* to easily apply your company's preferred *Document Name*, *Document Label* and *Document Permission Category*
- On transactions, quickly find documents related to your*Checklist Tasks*, and *Checklist Tasks* related to your docs. Learn how to Use Smart Checklists →

Standardized Document Names are not enforced. Users will be able to enter a different name in cases where a standard name is not applicable to a doc.

Video 🛛

() 1:25

Who Can Do This?

Only master admins can set up Standardized Document Names. All Pipeline users with permission to "Assign Docs" can use Standardized Document Names for docs they upload, assign, edit, break apart or merge in Pipeline.

How To

Navigate to the Document Names Area

To navigate to the Document Names area:



1 Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].

2 From the Customize section of the left menu, click [Document Names.]

Add Standardized Document Names

Single Document Name

To add a single document name:



2 Click [Add Doc Name].

Search address, mis, agent, seller, buyer	C 🏠 Transactions Tas	sks Unassigned Unreviewed Reports Reference	+ Add Transaction	? Help	Hollis
- People	Standardized Do				
Manage Locations		rdized doc names your users will select from X transaction. Optionally, if a doc name will always			
Manage Users	have a specific <u>Doc Label</u> or <u>Per</u> those here.	rmission Category associated with it, pre-assign			
- Customize	Learn more here →				
Company Settings					
Transaction Statuses	Add Doc Name				
Transaction Labels	+ Bulk add doc names				
Document Labels	Doc Name	Default Permission Category			
Document Names	Agency Disclosure	0			
Lead Sources	Commission Disbursement Auth	norization			



3 Enter your desired document name.

Search address, mls, agent, seller, buyer	C & Transactions 1	Fasks Unassigned Unreviewed Reports Referer		+ Add Transaction	; noip (3 noii
- People Manage Locations Manage Users	Add a list of predefined stand when adding a document to	ocument Names dardized doc names your users will select from a transaction. Optionally, if a doc name will always <u>Permission Category</u> associated with it, pre-assign			
- Customize Company Settings Transaction Statuses Transaction Labels Document (abels	Learn more here → Dec Name Inspection Report + Bulk add doc names	Add Doc Name			
Document Names	Doc Name	Default Permission Category			
Lead Sources	Agency Disclosure		۲		
	Commission Disbursement A	uthorization	٢		

4 Click [Add Doc Name]. Your new Standardized Document Name will appear in the list.

arch address, mls, agent, seller, buyer	C 🟠 Transactions T	asks Unassigned Unreviewed Reports Reference		+ Add Transaction ? He	Ip 🛞 Hollis
– People		ocument Names			
Manage Locations Manage Users	when adding a document to	dardized doc names your users will select from X a transaction. Optionally, if a doc name will always Permission Category associated with it, pre-assign			
 Customize Company Settings Transaction Statuses Transaction Labels 	Learn more here → Doc Name Inspection Report + Bulk add doc names	Add Doc Name			
Document Labels	+ Buik aad aoc names	Default Permission Category			
Document Names Lead Sources	Agency Disclosure	uthorization	0		

List of Document Names

To add a list of document names:

1 Navigate to the Document Names area.

2 Click [+ Bulk add doc names].

Search address, mis, agent, seller, buyer	Q	Unassigned Unreviewed Reports Reference	+ Add Transaction	? Help 🛞 Hollis
– People	Standardized Docu			
Manage Locations Manage Users	when adding a document to a tran	ad doc names your users will select from X Isaction. Optionally, if a doc name will always sion <u>Category</u> associated with it, pre-assign		
- Customize	Learn more here →			
Company Settings Transaction Statuses Transaction Labels	Add Doc Name Bulk add doc names			
Document Labels	Doc Name	Default Permission Category		
Document Names	Agency Disclosure	0		
Lead Sources	Commission Disbursement Authoriz	ation 💿		

3 Paste or type a list of up to 50 document names, one name per lineDocument Names already added to your list of Standardized Document Names will be automatically ignored.

rch address, mis, agent, seller, buyer	Contractions Tasks Unassigned Unreviewed Reports Reference		+ Add Transaction	; 1101
– People	Standardized Document Names			
Manage Locations	Add a list of predefined standardized doc names your users will select from when adding a document to a transaction. Optionally, if a doc name will always			
Manage Users	have a specific <u>Doc Label</u> or <u>Permission Category</u> associated with it, pre-assign those here.			
- Customize	Learn more here →			
Company Settings				
Transaction Statuses	Add Doc Name			
Transaction Labels	Bulk Add Doc Names			
Document Labels	Paste or type a list of up to 50 document names, one name			
Document Names	per line, then click "Preview Doc Names". Duplicate doc names will be ignored.			
Lead Sources	Learn more here			
– Templates	Buyer / Agent Agreement Purchase Agreement			
Business Holidays	Seller's Disclosure			
Checklists	Closing Disclosure			
Break Apart Docs	Title Insurance Policy Property Deed			
– Financials				
Agent Fees	Cancel Preview Doc Names			
Client Fees	Doc Name Default Permission Category			
Deductions	Agency Disclosure	0		
Commission Basis	Commission Disbursement Authorization	0		

4 Click [Preview Doc Names], then review your list of document names.

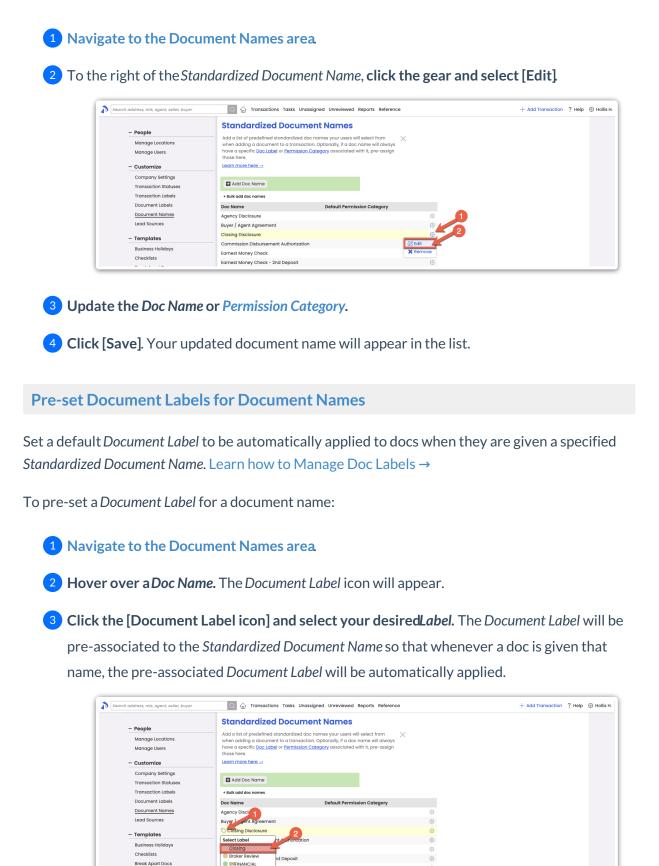
earch address, mis, agent, seller, buyer	🔍 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference	+ Add Transaction ? Help
- People Manage Locations Manage Users	Standardized Document Names Add a list of predefined standardized doc names your users will select from when adding a document to a transaction. Optionally, if a doc name will atways have a specific <u>Doc tabel</u> or <u>Permission Category</u> associated with it, pre-assign those here.	
 Customize 	Learn more here	
Company Settings Transaction Statuses	Add Doc Name	
Transaction Labels Document Labels <u>Document Names</u> Lead Sources	Buik Add Doc Names Poste or type o list of up to 50 document names, one name per line, han click 'Preview Doc Names'. Duplicate doc names will be ignored. Learn more bare ==	
– Templates	Buyer / Agent Agreement Purchase Agreement	
Business Holidays Checklists Break Apart Docs — Financials	Total Alsa Agentination Seler's Disclosure Inspection Report Closing Disclosure Title Insurance Policy Property Deed	
Agent Fees	Cancel Preview Doc Names	
Client Fees	Doc Name Default Permission Category	
Deductions	Agency Disclosure	
Commission Basis	Commission Disbursement Authorization	

5 Once you've confirmed your document names are entered correctly, **click** [Add Doc Names]. Your new *Standardized Document Name* will appear in the list.

rch address, mis, agent, seller, buyer	C fransactions Tasks Unassigned Unreviewed Reports Reference		+ Add Transaction ? I	ielp 💮
– People	Standardized Document Names			
Manage Locations Manage Users	Add a list of predefined standardized doc names your users will select from when adding a document to a transaction. Optionally, if a doc name will always have a specific <u>Doc Label</u> or <u>Permission Category</u> associated with it, pre-assign those here.			
– Customize	Learn more here →			
Company Settings Transaction Statuses	Add Doc Name			
Transaction Labels Document Labels	Preview Doc Names Click "Add Doc Names" to add the following 7 doc names.			
Document Names	 Buyer / Agent Agreement Purchase Agreement 			
– Templates	Seller's Disclosure Inspection Report Closing Disclosure			
Business Holidays Checklists	Title Insurance Policy Property Deed			
Break Apart Docs	Go Back Add Doc Names			
– Financials	Doc Name Default Permission Category			
Agent Fees	Agency Disclosure	٢		
Client Fees	Commission Disbursement Authorization	0		

Edit Standardized Document Names

To edit an existing *Standardized Document Name*:



Pre-set Document Permission Categories for Document Names

X No Label

– Financials

Set a default Document Permission Category to be automatically applied to docs when they are

fent- Fully Executed

given a specified *Standardized Document Name*. Learn more about Document Permission Categories →

To pre-set a Permission Category for a document name:

1 Edit a Standardized Document Name.

2 In the Default Permission Category column, select the dropdown and choose your preferred *Permission Category*.

ch address, mls, agent, seller, buyer	C 🔐 🖓 Transactions Tasks Unas	signed Unreviewed Reports Reference		+ Add Transaction ? Help
- People	Standardized Docume			
Manage Locations Manage Users	Add a list of predefined standardized doc names your users will select from when adding a document to a transaction, opticationally, if a doc name will advags have a specific <u>Doc Lobel or Permission Category</u> associated with it, pre-assign those here.			
- Customize	Learn more here →			
Company Settings Transaction Statuses	Add Doc Name			
Transaction Labels	+ Bulk add doc names			
Document Labels	Doc Name	Default Permission Category		
Document Names	Agency Disclosure			
Lead Sources	Buyer / Agent Agreement		©	
– Templates	Closing Disclosure	No Default	save cancel	
•	Commission Disbursement Authorization	No Default 🗸	۲	
Business Holidays Checklists	Earnest Money Check	Office Visible to office staff	0	
	Earnest Money Check - 2nd Deposit	Listing	0	
Break Apart Docs	Home Inspection Report	Visible to listing agents on the transaction and office staff	2	
– Financials	HUD-1 Settlement Statement- Fully Execut		0	
Agent Fees	HUD-1 Settlement Statement- Preliminary	Visible to listing and selling agents on the transaction and office staff	©	
Client Fees	Inspection Report	Buyer	۲	
Deductions	Lead Based Paint Disclosure	Visible to selling agents on the transaction and office staff	©	
Commission Basis	Listing Agreement	Public	۲	
	Listing Cancellation	Visible to listing and selling agents on	۲	
+ Backups	MLS Data Sheet / Input Form	the transaction and office staff Private	۲	
	Pre-Approval Letter	Visible to you and office staff	٢	
– Billing	Preliminary Title Report		0	

3 **Click [Save]**. The Document Permission Category will be pre-associated to the Standardized Document Name so that whenever a doc is given that name, the pre-associatedPermission Category will be automatically applied.

Pipeline Pro Webinar Recording - Standardized Document Names

In this webinar, we'll go over all the ways*Standardized Document Names* impact how you and your team work and how they can be utilized simply or creatively to save time.

View more Pipeline Pro Webinars here →

() 8:09