

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*.

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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 ▮

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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:

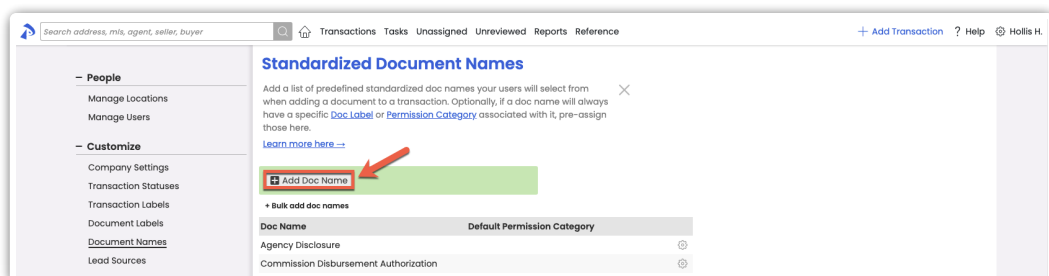
- 1 Go to **Admin / Settings** by clicking your name in the upper right corner, then [Admin / Settings].
- 2 From the *Customize* section of the left menu, click **[Document Names]**.

Add Standardized Document Names

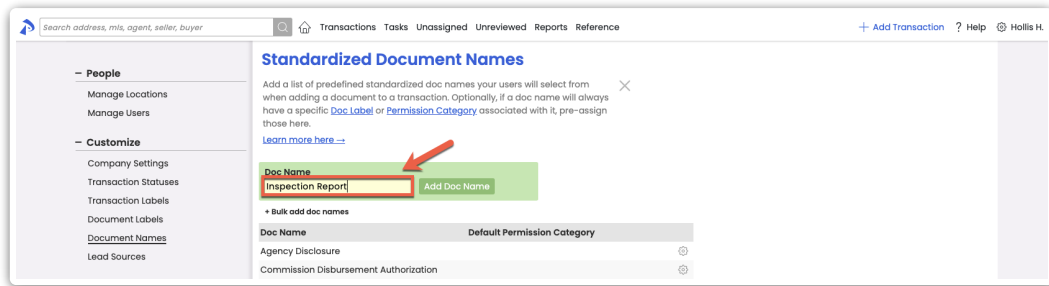
Single Document Name

To add a single document name:

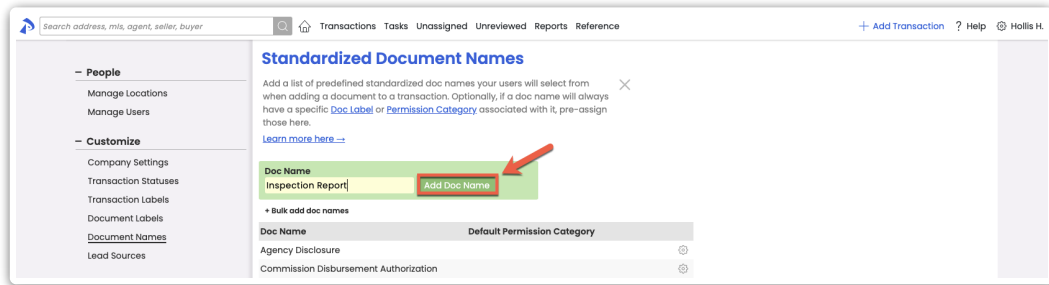
- 1 **Navigate to the Document Names area.**
- 2 **Click [Add Doc Name].**



- 3 **Enter your desired document name.**



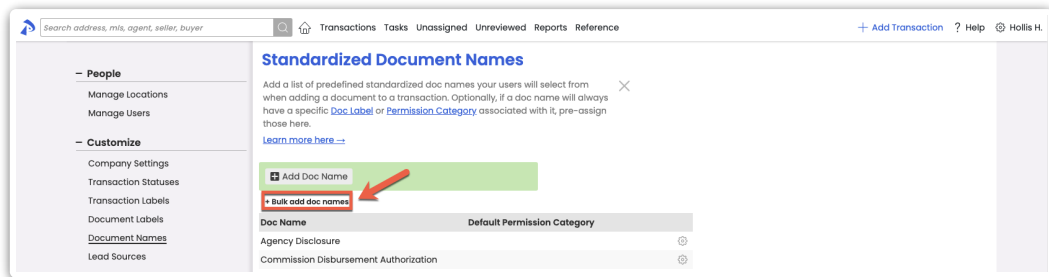
- 4 Click [Add Doc Name]. Your new *Standardized Document Name* will appear in the list.



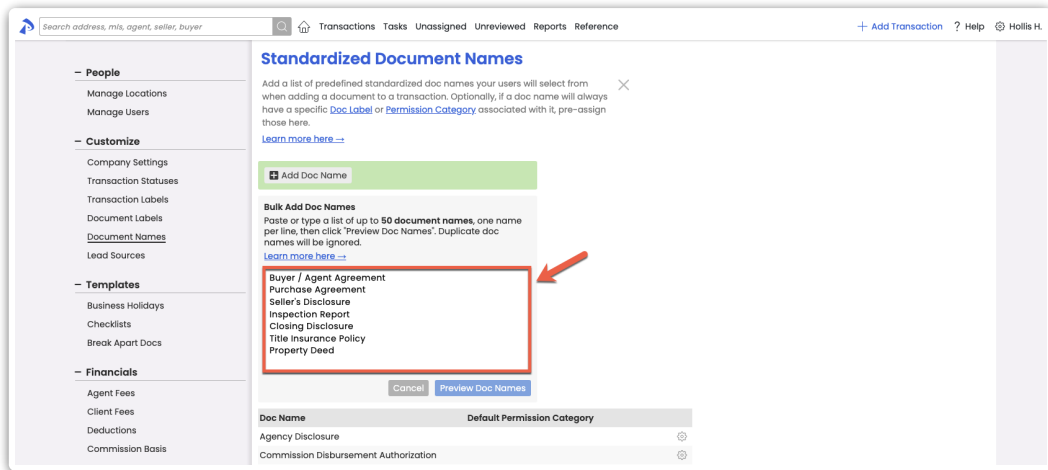
List of Document Names

To add a list of document names:

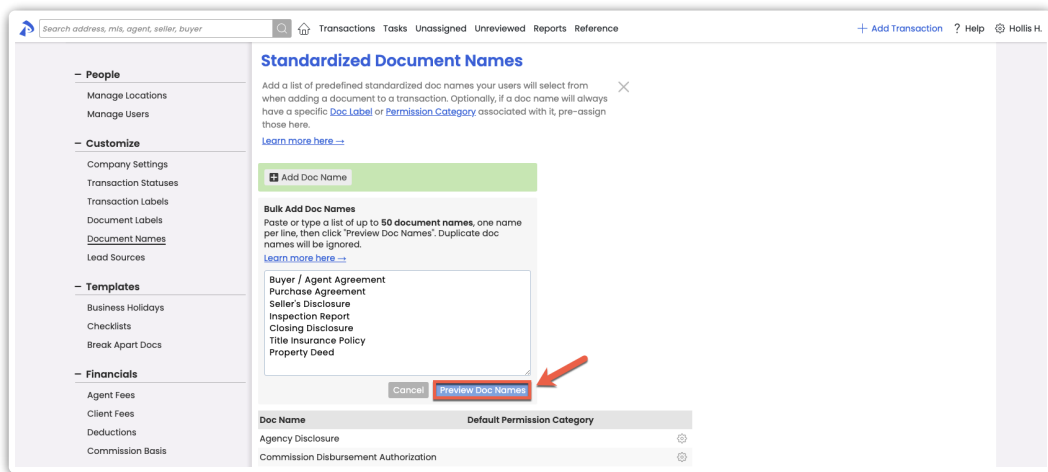
- 1 Navigate to the Document Names area
- 2 Click [+ Bulk add doc names].



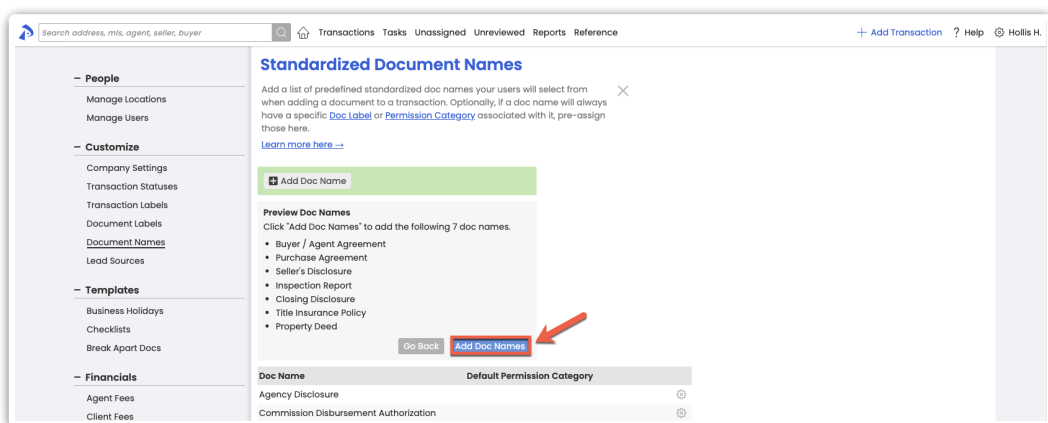
- 3 Paste or type a list of up to 50 document names, one name per line. Document Names already added to your list of *Standardized Document Names* will be automatically ignored.



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



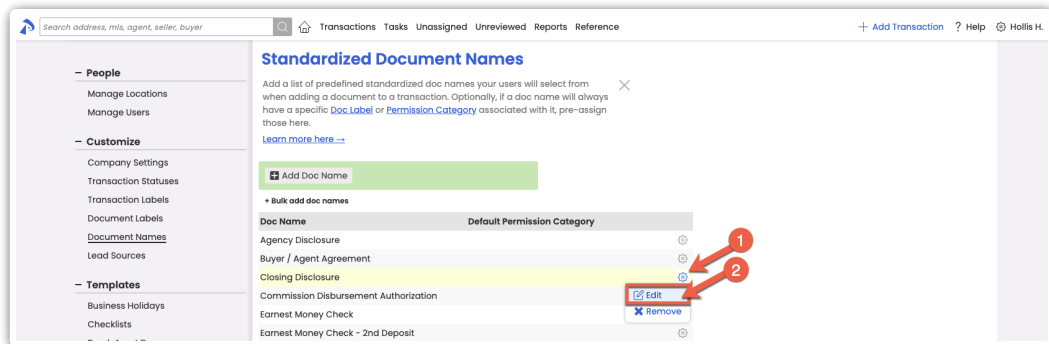
5 Once you've confirmed your document names are entered correctly, click [Add Doc Names]. Your new *Standardized Document Name* will appear in the list.



Edit Standardized Document Names

To edit an existing *Standardized Document Name*:

- 1 Navigate to the Document Names area.
- 2 To the right of the *Standardized Document Name*, click the gear and select [Edit].



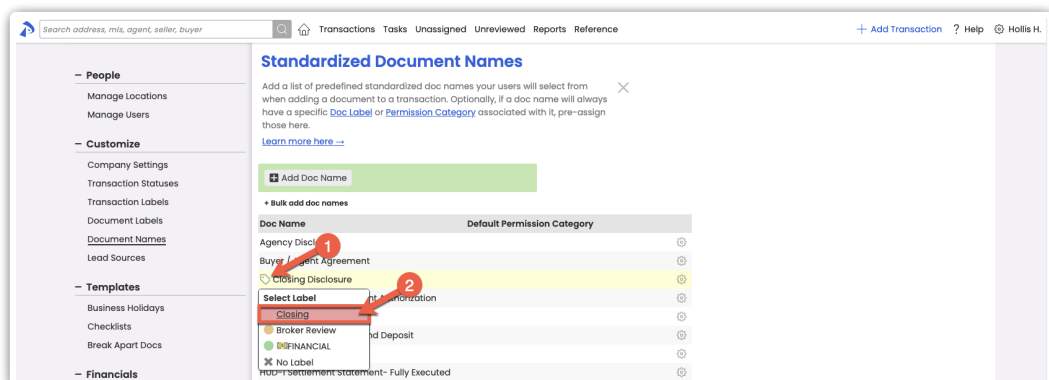
- 3 Update the *Doc Name* or *Permission Category*.
- 4 Click [Save]. Your updated document name will appear in the list.

Pre-set Document Labels for Document Names

Set a default *Document Label* to be automatically applied to docs when they are given a specified *Standardized Document Name*. [Learn how to Manage Doc Labels →](#)

To pre-set a *Document Label* for a document name:

- 1 Navigate to the Document Names area.
- 2 Hover over a *Doc Name*. The *Document Label* icon will appear.
- 3 Click the [Document Label icon] and select your desired *Label*. The *Document Label* will be pre-associated to the *Standardized Document Name* so that whenever a doc is given that name, the pre-associated *Document Label* will be automatically applied.



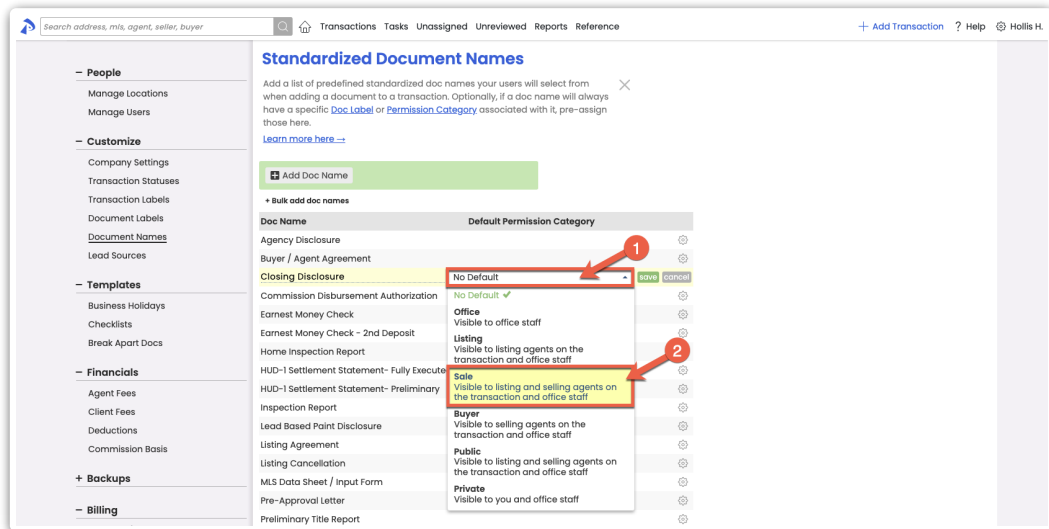
Pre-set Document Permission Categories for Document Names

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

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*.**



- 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-associated *Permission 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](#) →

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