

# Managing and Using Doc Labels

## SUMMARY

Use custom color-coded document labels on your transaction's docs for easy sorting and categorizing.

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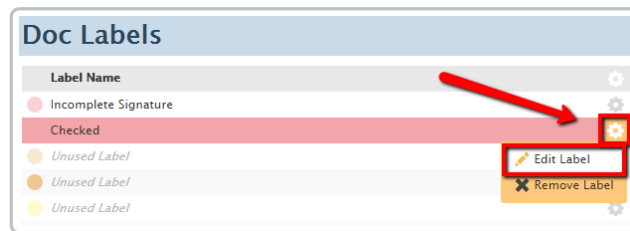
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## Define Document Labels

To define document labels:

- 1 Click your name in the upper right corner then [Admin / Settings].
- 2 Click [Document Labels].
- 3 Click directly on a label name or click the gear, then [Edit Label] Then, give that colored label a name.

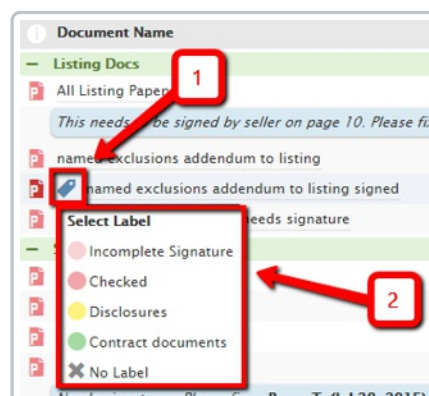
- 4 Enter document types, custom categories, statuses, initials of admins, or whatever classification of docs meets your office's needs.



## Apply a Label to a Document

to apply a label to a document:

- 1 Go to a transaction's docs and hover over a doc name until a label icon appears.
- 2 Click it to select the desired label or to remove a label. Use the same process on Unassigned Docs.



## Paperless Pipeline Pro Webinar: Document Labels - Best Practices and Special Uses

Learn how document labels can help streamline your work processes as we cover best practices and special use cases for the labels.

🕒 9:44

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