

# Set Up and Manage Reference Docs & Links

Use the *Reference* page as a library to store and share your company's frequently used forms, disclosures, training materials, and other documents or links your agents and admins needs access to regularly.

Once an admin adds docs or links to *Reference*, your team can easily access the information they need without having to hunt for it. [Learn how to Download and Use Reference Docs & Links](#) →

From the [Reference page](#), admins can add, organize, and delete your company's shared *Reference* documents and links.

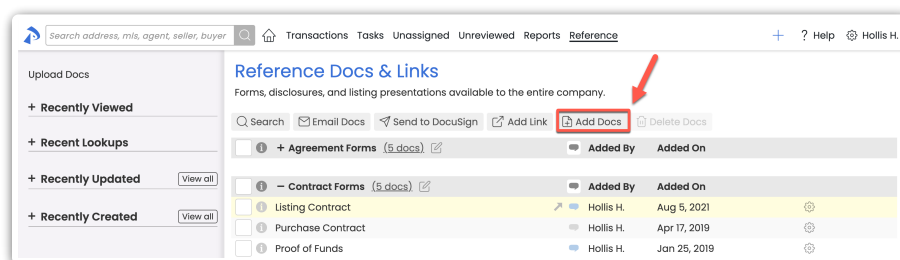
## Add a Reference Doc

Add a document to the *Reference* page so your team can easily access it.

**Who Can Do This? Admins.**

To add a *Reference* doc:

- 1 Go to the [Reference page](#) by clicking [Reference] from the top menu.
- 2 Click [Add Docs] at the top of the page.



- 3 Choose *Reference* docs to upload by dragging them from your computer into the blue box, or by clicking the blue box to select them from your computer.

Upload Reference Docs

Drag docs here  
or click to choose docs from your computer

File Name	Doc Name	Category

[Upload Docs](#)

- 4 Name the doc(s) by entering their *Doc Name*.

Upload Reference Docs

Drag docs here  
or click to choose docs from your computer

File Name	Doc Name	Category
org.pdf	Our Mission Statement	- Choose a category -
Yearly Report.pdf	Awards & Recognition	- Choose a category -

[Upload Docs](#)

- 5 Categorize the doc(s) by selecting [- Choose a category -] and choosing an existing *Reference Category* or by entering a new *Category*.

Upload Reference Docs

Drag docs here  
or click to choose docs from your computer

File Name	Doc Name	Category
org.pdf	Our Mission Statement	Our Company
Yearly Report.pdf	Awards & Recognition	- Choose a category -

Agreement Forms

Contract Forms

Images

Listing Forms

Misc Forms - Do not edit

Misc. Forms

Miscellaneous Forms

Montas Stuff

New Closing Forms

New Docs

[Upload Docs](#)

- 6 Click [**Upload Docs**]. Once *Reference* docs are added, agents and admins can view, download and email them. [Learn how](#) →

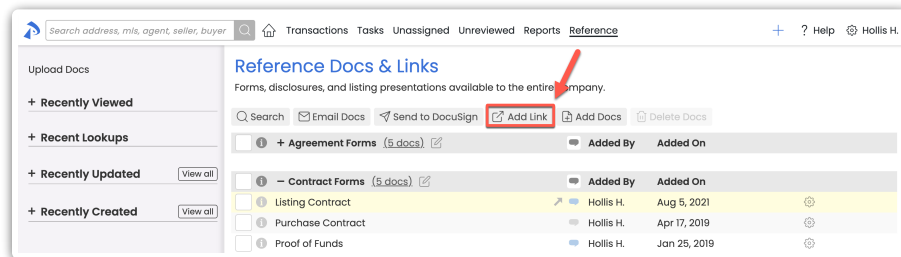
## Add a Reference Link

Add a link to the *Reference* page so your team can easily access it.

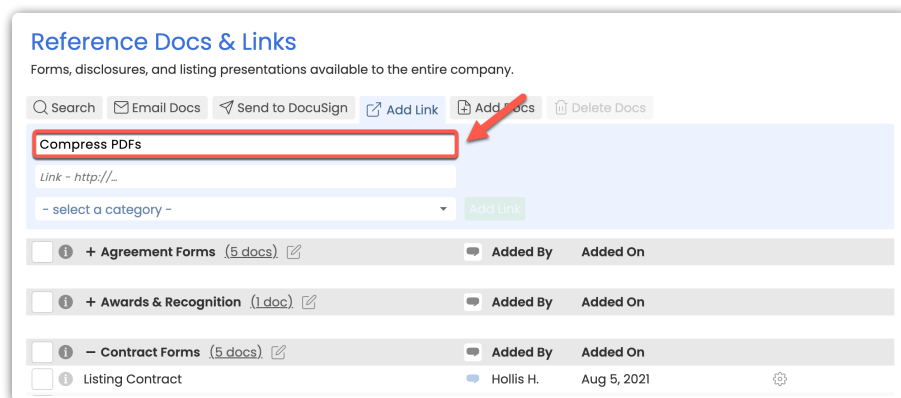
## Who Can Do This? Admins.

To add a *Reference* link:

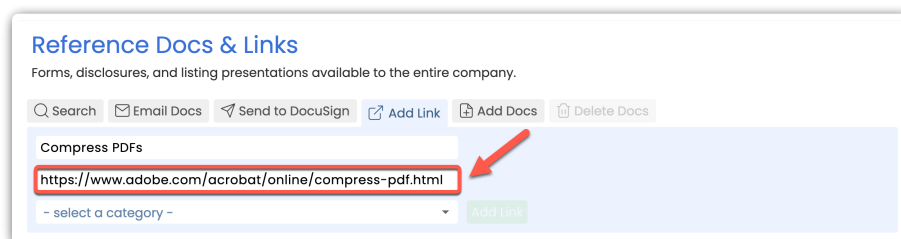
- 1 Go to the **Reference page** by clicking [Reference] from the top menu.
- 2 Click [Add Link] at the top of the page.



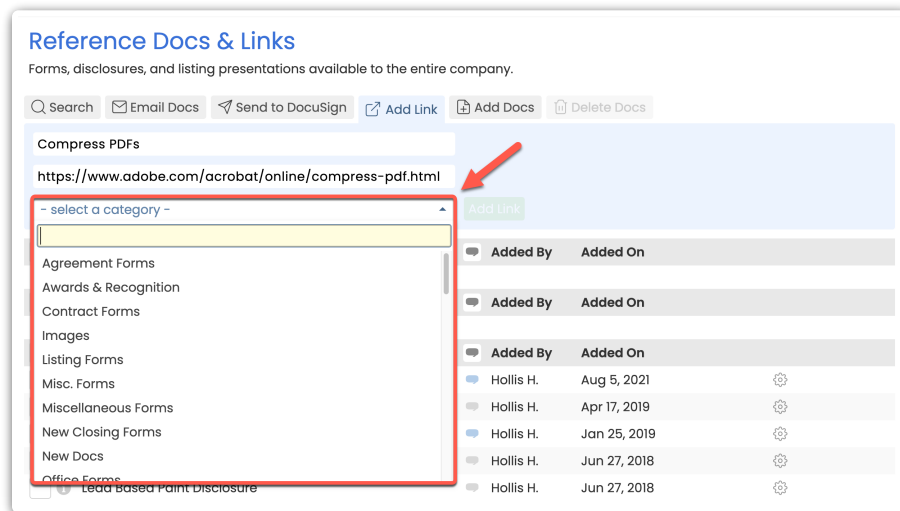
- 3 Name the link by entering the *Link Name*.



- 4 Enter the *Link URL*.



- 5 **Categorize the link** by choosing [- Select a category -] and selecting an existing *Reference Category* or by entering a new *Category*.



- 6 Click [Add Link]. Once *Reference* links are added, agents and admins can view and email them. [Learn how](#) →

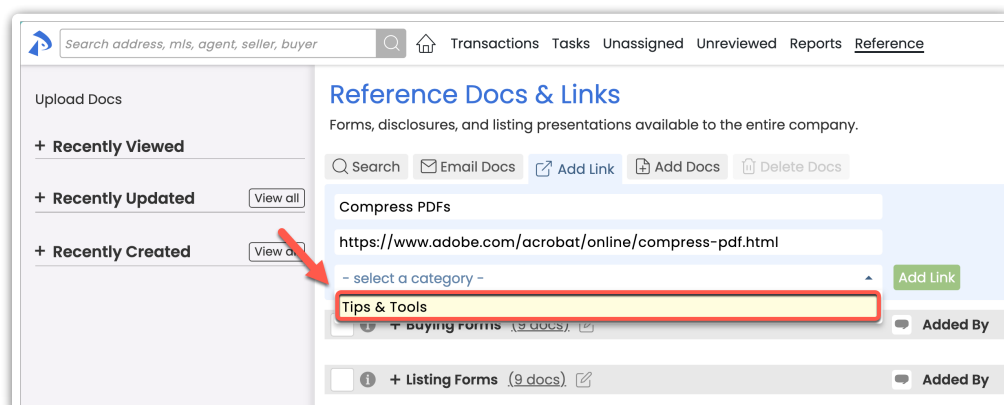
## Add a Reference Category

Create a new category to appropriately group *Reference* docs and links.

**Who Can Do This?** Admins.

To create a new category on the *Reference* page:

- 1 As you are adding / editing a *Reference* doc or link (described above), click the [- category -] dropdown menu.
- 2 Type the name of the new *Reference* category.



- 3 Continue adding or editing the *Reference* doc or link.

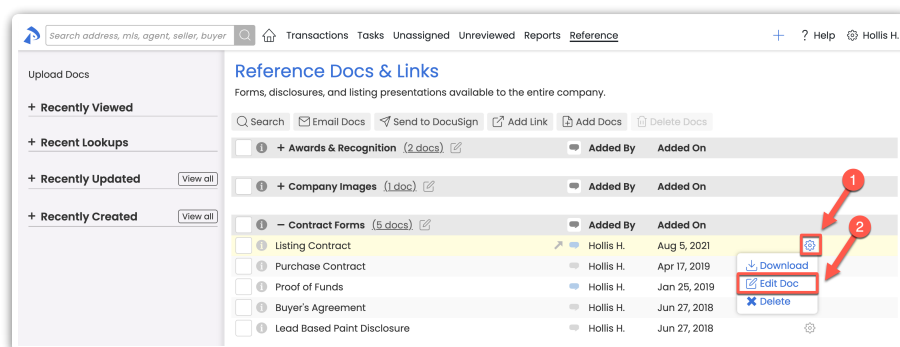
## Edit a Reference Doc

Update a *Reference* doc's name or move the doc to another category.

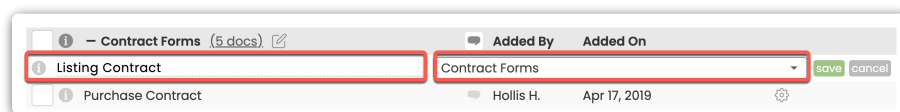
Who Can Do This? Admins.

To make a change to a *Reference* doc's name or category:

- 1 Go to the **Reference** page by clicking [Reference] from the top menu.
- 2 Click [⚙️] to the right of the doc you want to edit, then [Edit Doc].



- 3 Update the doc's *Name* or *Category*.



- 4 Click [Save].

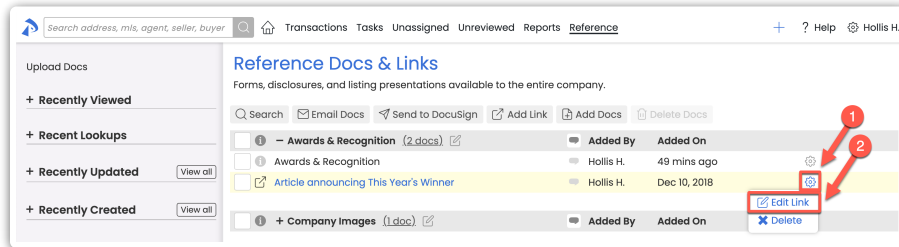
## Edit a Reference Link

Update a *Reference* link's name, URL or move it to another category.

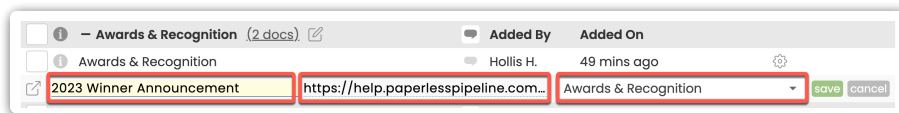
Who Can Do This? Admins.

To make changes to a *Reference* link:

- 1 Go to the **Reference page** by clicking [Reference] from the top menu.
- 2 Click [⚙️] to the right of the link you want to edit, then [Edit Link].



- 3 Update the link's **Name**, **URL**, or **Category**.



- 4 Click [Save].

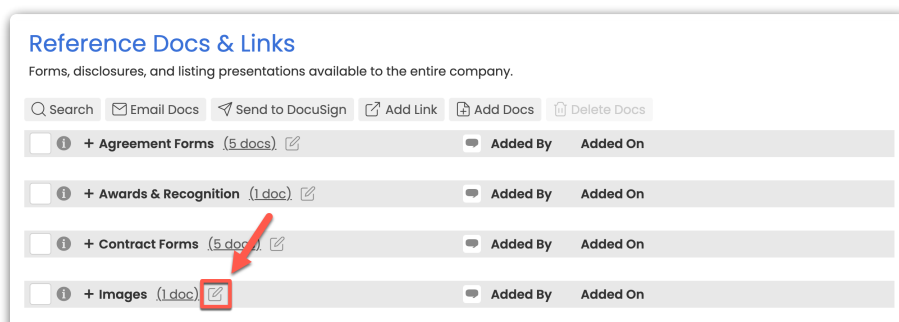
## Edit a Reference Category

Update the name of a *Reference Category* to appropriately group docs and links.

**Who Can Do This? Admins.**

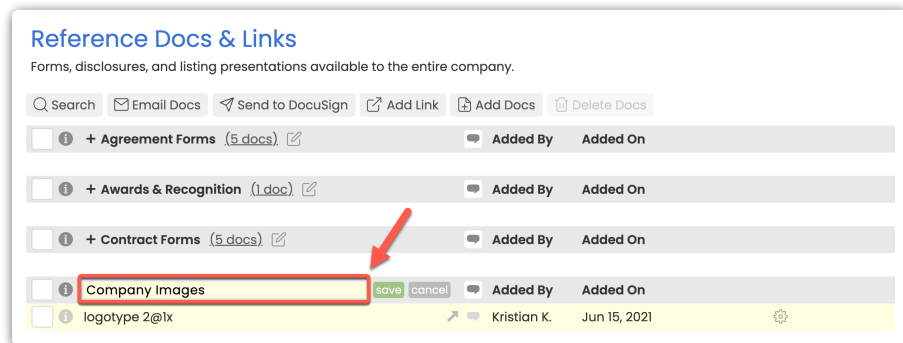
To change the name of a *Reference Category*:

- 1 Go to the **Reference page** by clicking [Reference] from the top menu.
- 2 Click [the pencil icon] to the right of the category you want to change.





3 Enter the new name for the *Reference Category*.



4 Click [Save].

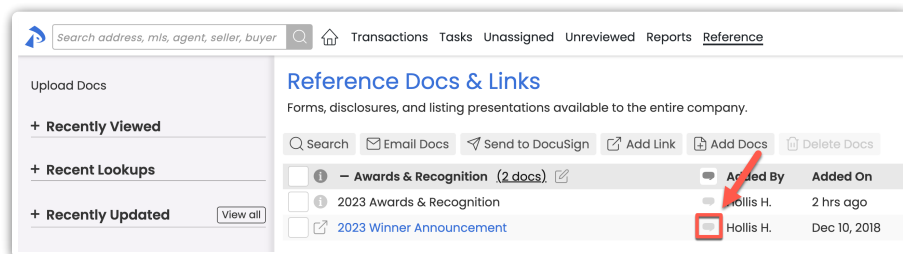
## Comment on a Reference Doc or Link

Comment on a *Reference* doc or link to share more details about it with your team.

**Who Can Do This? Admins.**

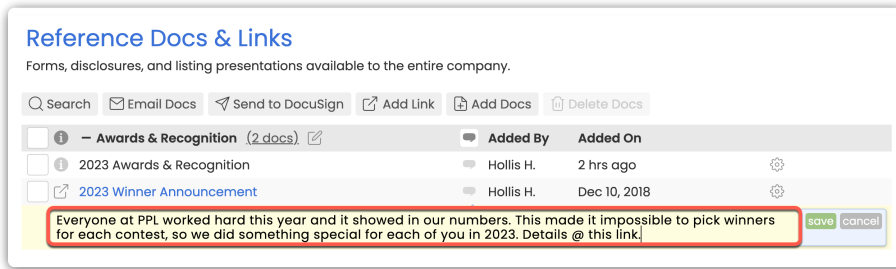
To comment on a *Reference* doc or link:

- 1 Go to the **Reference page** by clicking [Reference] from the top menu.
- 2 Click [the comment icon] next to the doc or link you want to make a comment on.



3 Add a new comment or make changes to an existing one:

- To add a new comment, enter it in the yellow comment box.
- To make changes to an existing comment, click [the edit icon] then update your comment.



- 4 Click [Save]. Once comments are added, agents and admins see them when viewing Reference docs and links.

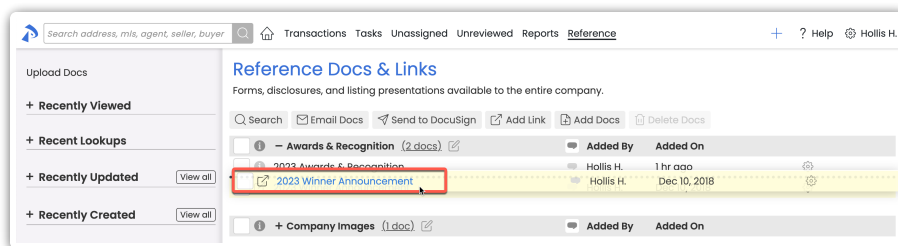
## Reorder Reference Docs & Links

Change the order of your company's docs and links on the Reference page.

Who Can Do This? Admins.

To change the order of Reference docs and links within a Category:

- 1 Go to the Reference page by clicking [Reference] from the top menu.
- 2 Click a doc or link, then hold and drag it.



- 3 Drop it into a new position within the Category.



<input type="checkbox"/>	<b>+ Company Images</b> (1 doc)	<b>Added By</b>	<b>Added On</b>
<input type="checkbox"/>	<b>- Contract Forms</b> (5 docs)	<b>Added By</b>	<b>Added On</b>
<input type="checkbox"/>	Listing Contract	Hollis H.	Aug 5, 2021
<input type="checkbox"/>	Purchase Contract	Hollis H.	Apr 17, 2019
<input type="checkbox"/>	Proof of Funds	Hollis H.	Jan 25, 2019
<input type="checkbox"/>	Buyer's Agreement	Hollis H.	Jun 27, 2018
<input type="checkbox"/>	Lead Based Paint Disclosure	Hollis H.	Jun 27, 2018
<input type="checkbox"/>	<b>+ Listing Forms</b> (2 docs)	<b>Added By</b>	<b>Added On</b>
<input type="checkbox"/>	<b>+ Miscellaneous Forms</b> (8 docs)	<b>Added By</b>	<b>Added On</b>
<input type="checkbox"/>	<b>+ New Closing Forms</b> (4 docs)	<b>Added By</b>	<b>Added On</b>

## Delete Reference Docs & Links

Delete an unneeded doc or link on your company's Reference page.

**Who Can Do This?** Admins with permission to *Delete any docs*.

To delete an unneeded doc or link from the Reference page:

- 1 Go to the **Reference** page by clicking [Reference] from the top menu.
- 2 Click to the right of the doc or link you want to delete, then [Delete].

The screenshot shows the 'Reference Docs & Links' page. The table contains the following data:

	Added By	Added On
<b>+ Awards &amp; Recognition</b> (2 docs)		
<b>+ Company Images</b> (1 doc)		
<b>- Contract Forms</b> (5 docs)		
Listing Contract	Hollis H.	Aug 5, 2021
Purchase Contract	Hollis H.	Apr 17, 2019
Proof of Funds	Hollis H.	Jan 25, 2019
Buyer's Agreement	Hollis H.	Jun 27, 2018
Lead Based Paint Disclosure	Hollis H.	Jun 27, 2018

- 3 Click [delete] again to confirm the deletion

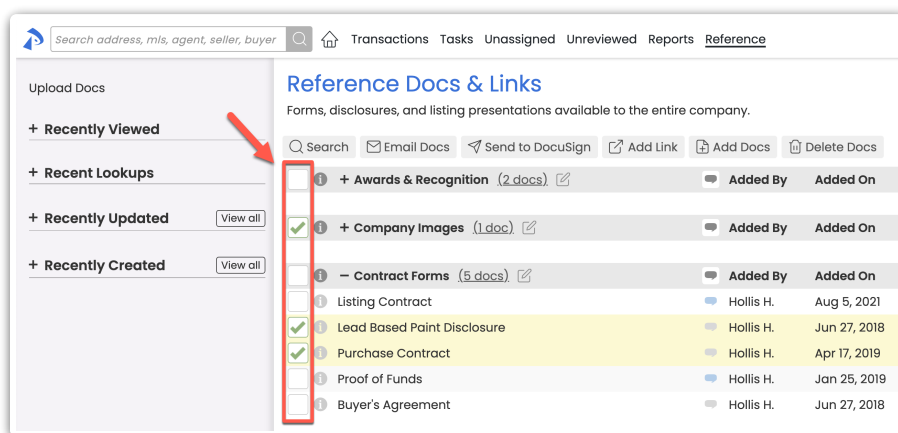
## Bulk Delete Reference Docs & Links

Delete multiple unneeded docs or links at once on your company's *Reference* page.

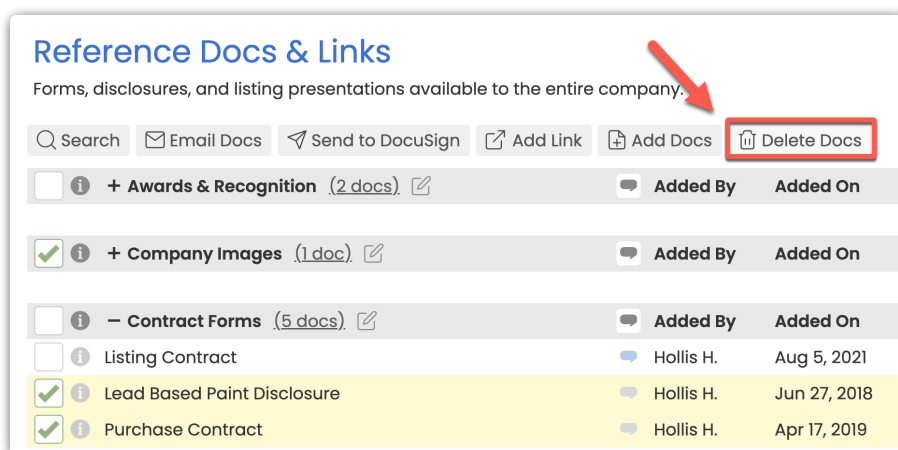
**Who Can Do This?** Admins with permission to *View all transactions* and *Delete any docs*.

To delete multiple unneeded docs or links from the *Reference* page at once:

- 1 Go to the **Reference page** by clicking [Reference] from the top menu.
- 2 Choose the docs or links you want to delete by checking the box for an individual doc, link or an entire category.



- 3 Click [Delete Docs] at the top of the page.



- 4 Click [Delete] again to confirm the bulk deletion

Building a custom training library ▮

**Watch this to become a Pipeline Pro on the Reference page:** Whether you need to implement initial roll-out training or ongoing training for new agents, you won't want to miss this session! You'll learn how to create custom training libraries that will help you train your team on the parts of Pipeline they need to know.

**Who Can Do This?** *Paperless Pipeline Pro Webinars* are for master admins and admins with permission to *View all transactions*.

▮ 10:03

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[View more Paperless Pipeline Pro Webinars →](#)

## The Reference Page ▮

**Watch this to become a Pipeline Pro on the Reference page:** This Pipeline Pro webinar covers the various options available on the *Reference* page as well as how to best utilize them.

**Who Can Do This?** *Paperless Pipeline Pro Webinars* are for master admins and admins with permission to *View all transactions*.

▮ 6:29

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[View more Paperless Pipeline Pro Webinars →](#)

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