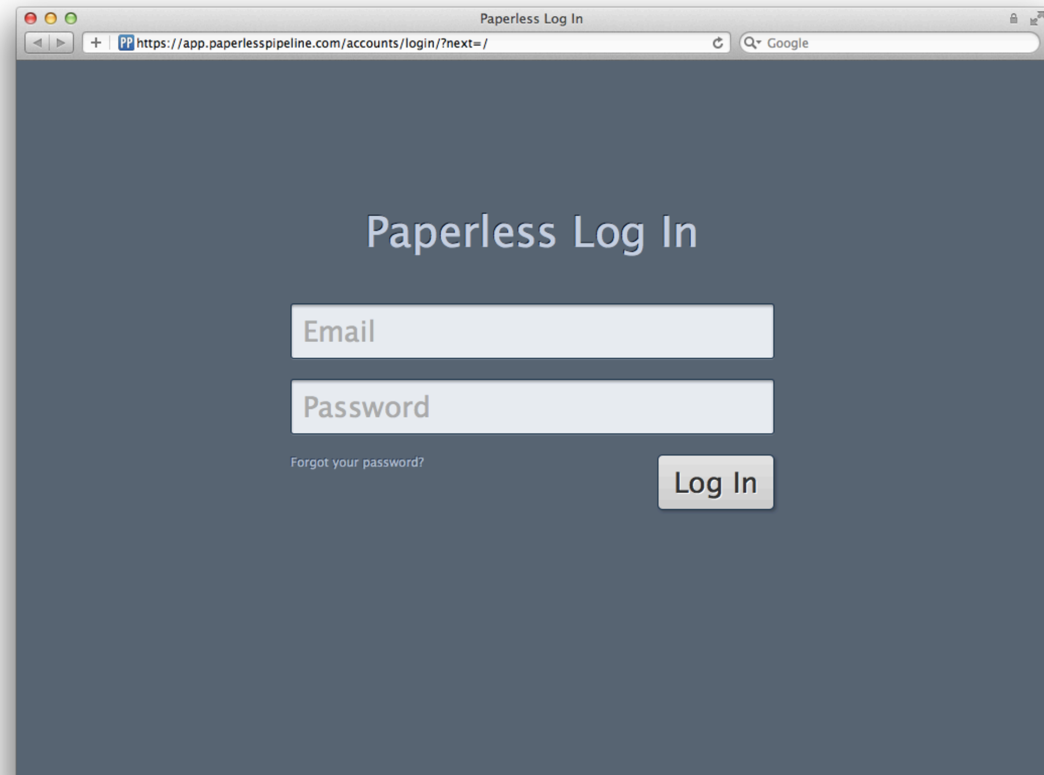
Paperless Pipeline

Agent Manual

The Basics

Logging In

A welcome email with your username and password has been sent to you. To log in, go to: app.paperlesspipeline.com and enter your login information.



Forgot your password?

If you forget your password or can't find your welcome email, go to the login screen and enter your login email, then click on "Forgot Your Password?" An email with detailed instructions on how to reset your password will be sent to you.

Need help?

For questions or issues related to Paperless Pipeline, email help@paperlesspipeline.com. For transaction-specific questions, email your Admin + Tech Support contact who is listed on the dashboard.

Have a question while you're in Paperless Pipeline?

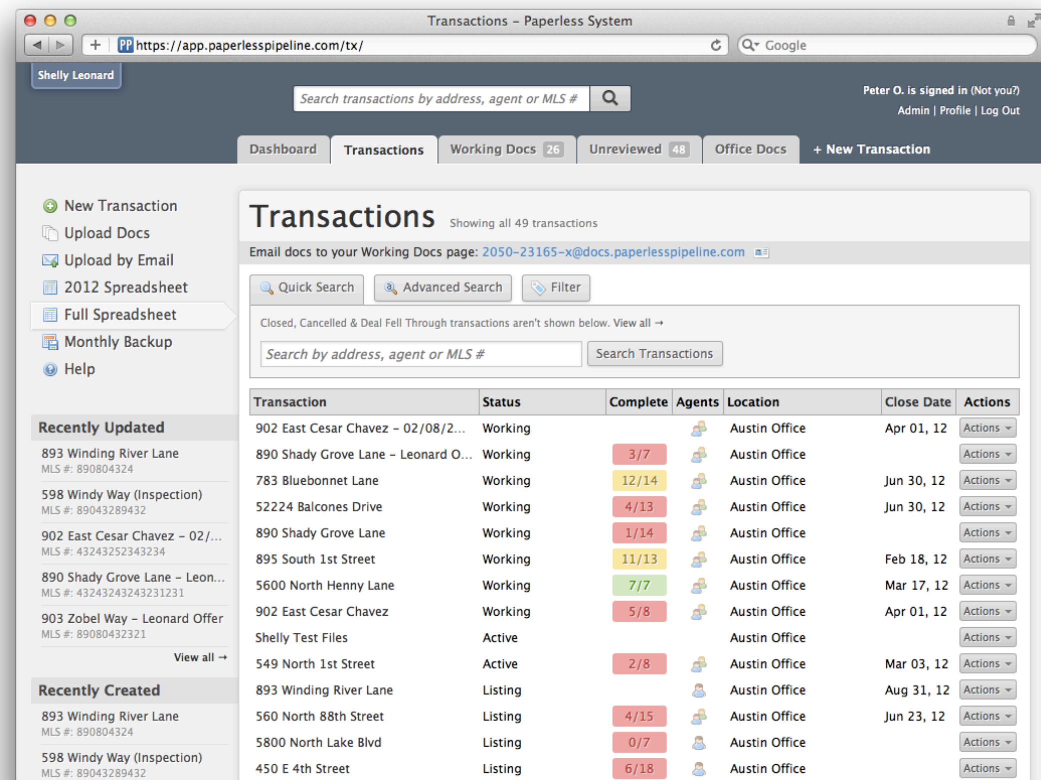
The Paperless Pipeline team offers help within the application that you can access by clicking "Help" on the left side of each page. These sections include commonly asked questions for the specific page you're on.

You can also get help from a member of our team by clicking the black box in the bottom right side of the screen. Simply enter your name and email address to email or chat with our support team.

Viewing Your Transactions

Accessing your transactions

To view a full list of your transactions, go to the Transactions tab.

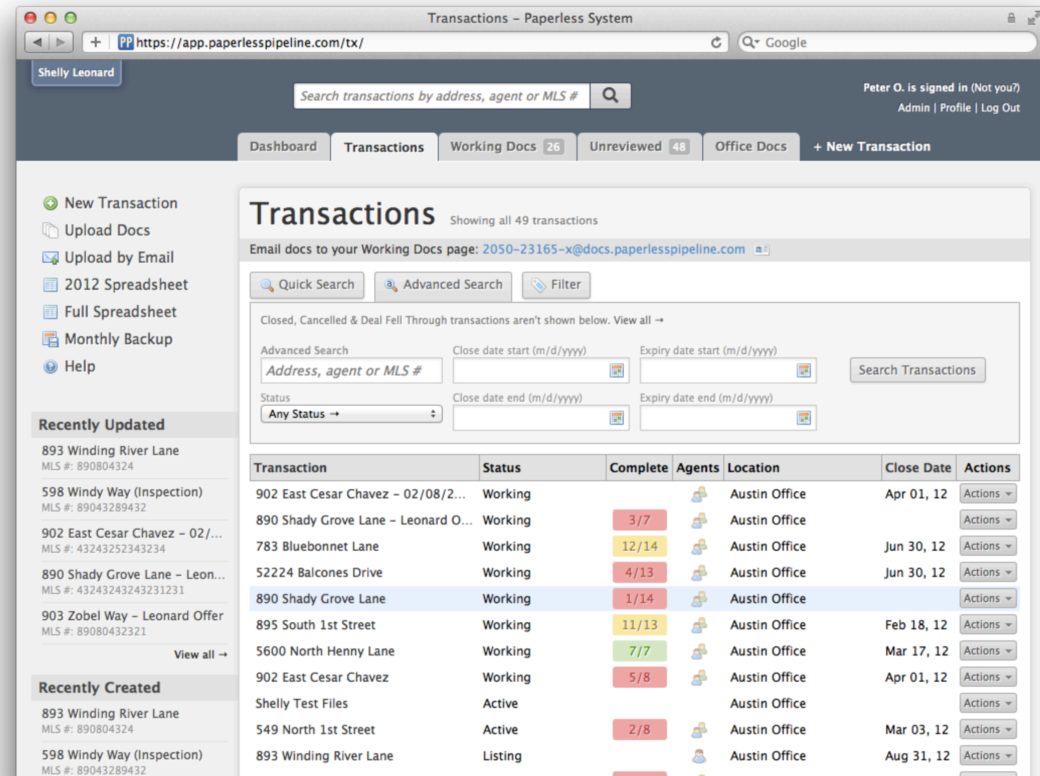


Find a transaction

You can find a specific transaction in three different ways:

- **Quick Search**
  This is the default option you'll see when you get to your transactions tab. You can search by agent, MLS #, property address, or buyer.

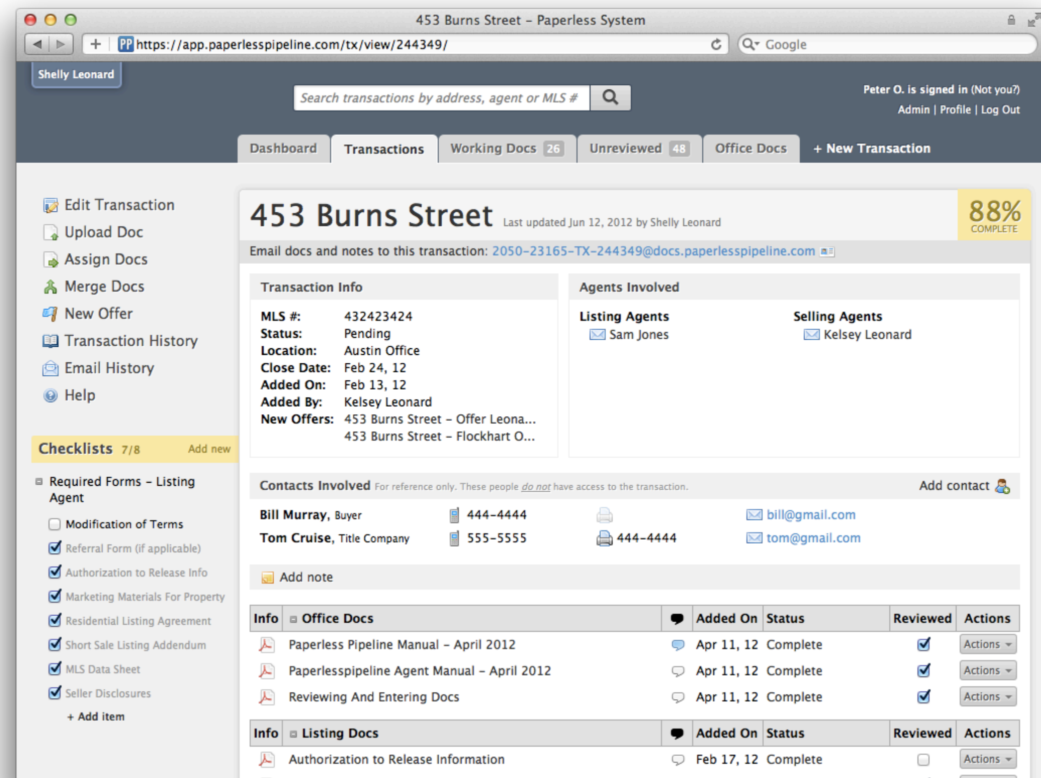
- **Advanced Search**
  Click on “Advanced Search” to search by transaction status, close date, or expiration date. *Example: You could use this tool to find all of your transactions that close during the month of April.*



- **Filter**
  Filtering allows you to sort your transactions by status, checklist status (incomplete, complete, or no checklist), and document status.

View a Transaction

To view a specific transaction, go to the Transactions tab and click on a transaction's property address. This will take you to a page where you can review all information associated with your transaction.



Transaction Info

This section gives you a quick overview of important transaction information like the MLS #, transaction status, and close date.

Agents Involved

Here you can see the transaction's listing and selling agents. If one of the agents is an outside agent, that will be noted beside their name.

Outside agents do not have access to the system.

Contacts Involved

To add contact information of third parties that are involved in the transaction (ex. A rep from the title company), click on “Add Contact.” You can enter their name, title, phone number, fax number, and email address. Contacts are viewable to anyone who has access to the transaction.

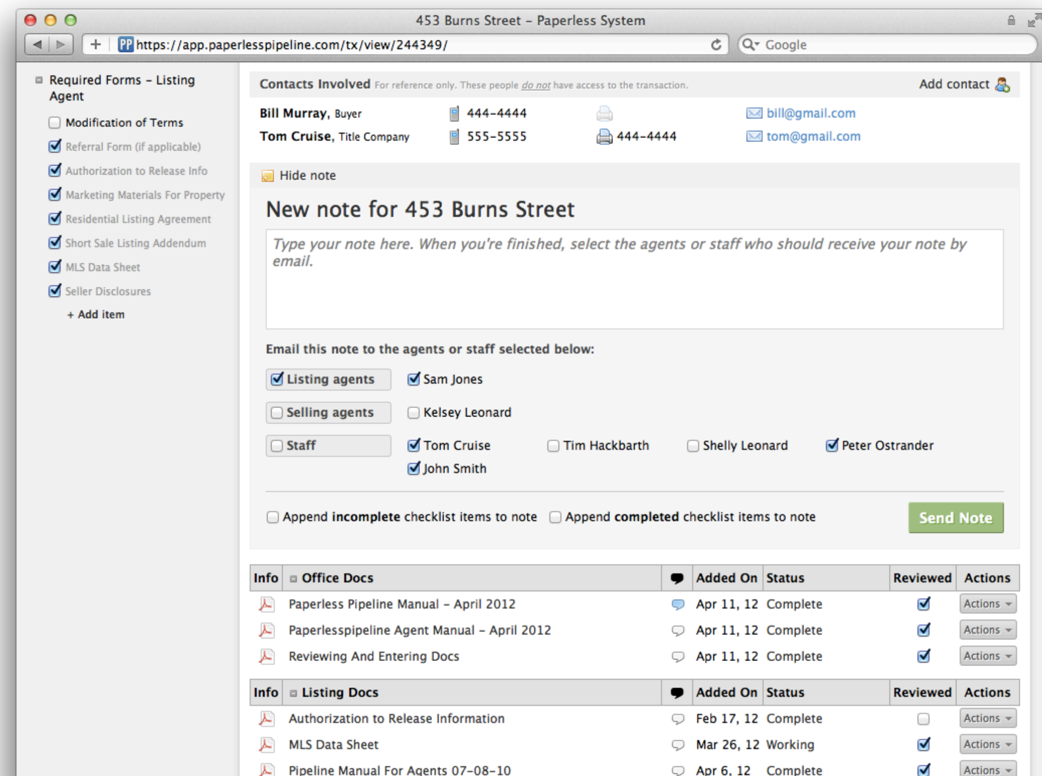
Documents

All documents that you have the permission to view are listed in categories.

For example: If you’re a listing agent, you’ll be able to see Listing Docs, Sale Docs, and Public Docs. If you’re a selling agent, you’ll be able to see Sale Docs, Buyer Docs, and Public Docs.

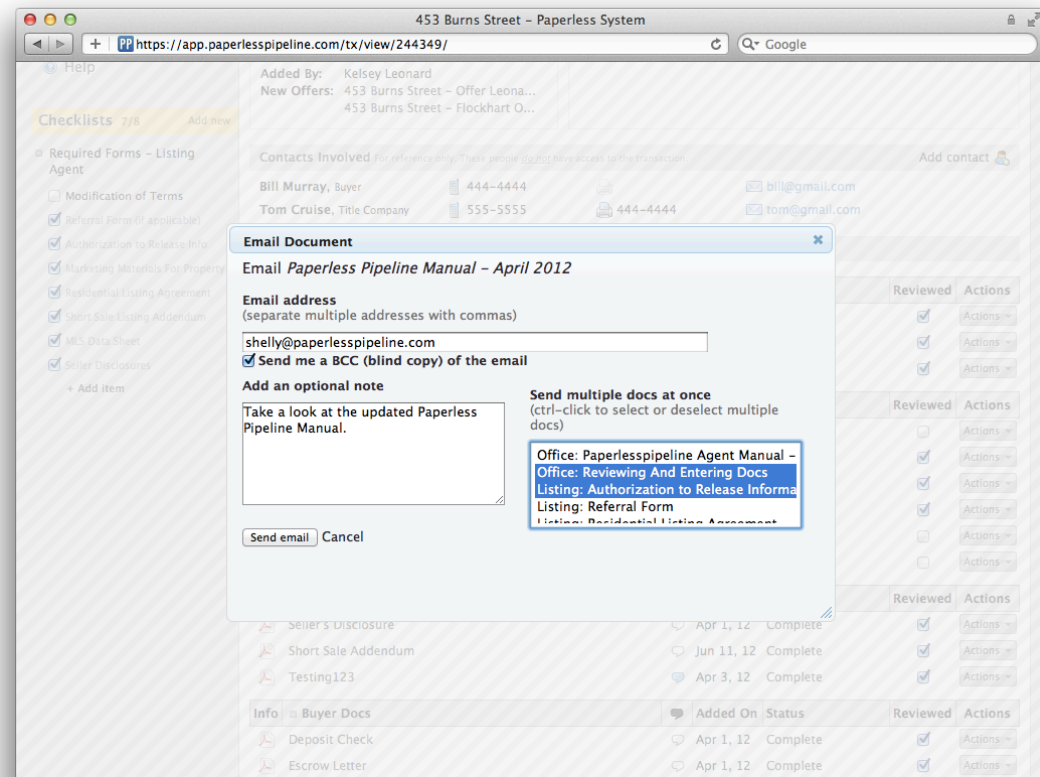
Transaction Notes

Transaction notes are the best way to communicate with your internal team. To create a note, click on “Add Note” and the screen will expand to let you enter a message, then select the recipients. Your office staff, listing, and selling agent are shown as recipients. Check the boxes in front of whom you’d like to send the note to, then click “Send Note.” Those recipients will be emailed and the note will appear in the transaction’s Note History.



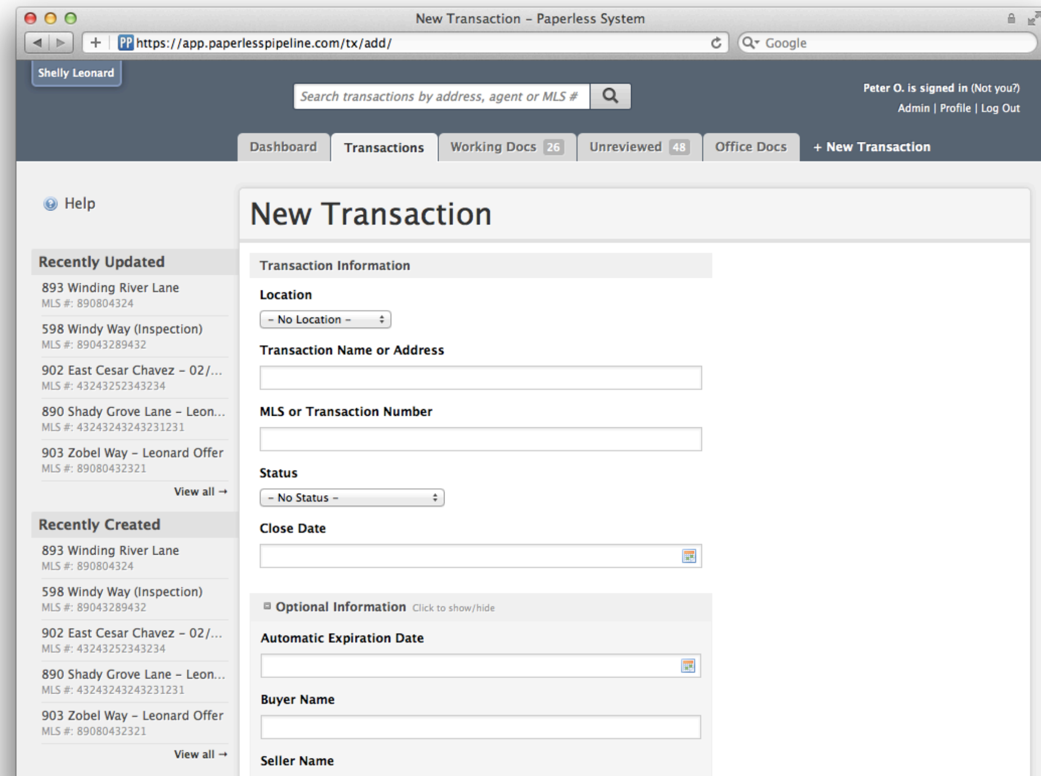
Email a Document

If you need to email a document to an outside party, you can do that from your transaction page. Click on “Actions” to the right of the document you want to send, then select “Email Doc.” Now, type in the recipient’s email address and write an optional message. If you’d like to send more than one document, you can CTRL-click (PC) or Command-click (Mac) on multiple documents on the right.



Adding a Transaction

To add a transaction, go to the Transactions tab and click on “New Transaction” in the left menu. This will take you to a screen where you can input your transaction information.



Assign agents to your transaction

The last step in creating a transaction is selecting the listing and selling agents. To select agents, click the “ + “ button beside your office’s name. This will open a list of all active agents in that office.

Working with an outside agent?

Check the checkbox at the bottom of the page that says “This transaction has outside (co-op) agents.” Two fields will appear that allow you to enter the name of the outside listing or selling agent.

When you’re finished inputting your transaction information, click “Add Transaction.” After the information saves, you’ll be taken to your transaction’s page.

Adding Docs to Paperless Pipeline

There are two ways to get documents into the system: Uploading and emailing.

Uploading Docs

You can upload to an individual transaction or Working Docs.

- **Upload to an individual transaction**
  Go to your transaction's page and click on "Upload Docs" on the left menu. Then, click on "Choose Docs" to browse your computer. After you upload your documents, they'll be sent to Working Docs where they'll wait to be assigned.

- **Upload to Working Docs**
  Working Docs is the online equivalent of your broker or admin's folder inbox. It serves as a holding area for all documents uploaded into the system. You can also upload your documents directly to Working Docs by clicking on the "Working Docs" tab and selecting "Upload Docs" in the left menu. After they've been uploaded, they'll stay in Working Docs until assigned.

Helpful Hints For Uploading Docs:

- **Select Multiple Docs**
  If you'd like to select multiple documents, hold down CTRL on a Windows computer or ⌘ (Command) on a Mac while clicking individual documents.

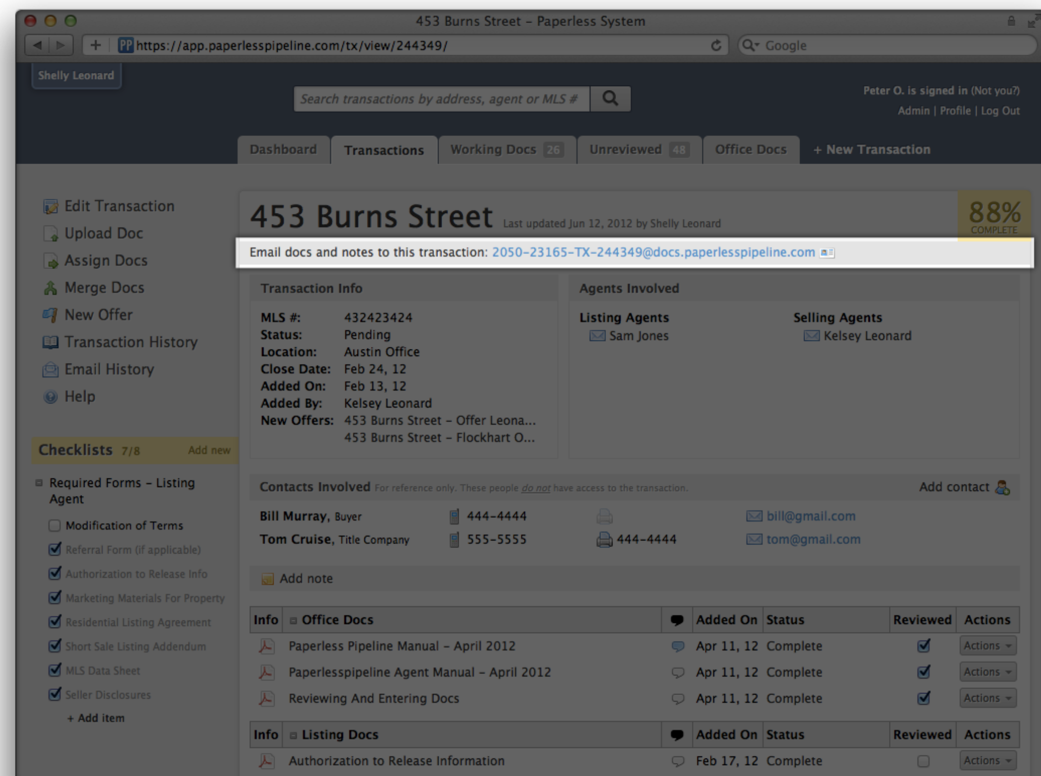
- **Docs Upload Immediately**
  After you've selected documents, they'll begin uploading immediately. You can cancel pending uploads by clicking the

red “X” on the right-hand side of the progress bar. You need to remain on this page until all docs have been successfully uploaded. If you leave before the uploads have completed, the process will be aborted.

Emailing Docs into Paperless Pipeline

You can also email transaction documents directly into Paperless Pipeline using your maildrop address.

If you know which transaction the docs need to go to, you can email documents directly into your transaction file. To find your personal, transaction-specific maildrop address, click on the transaction you’re working on.



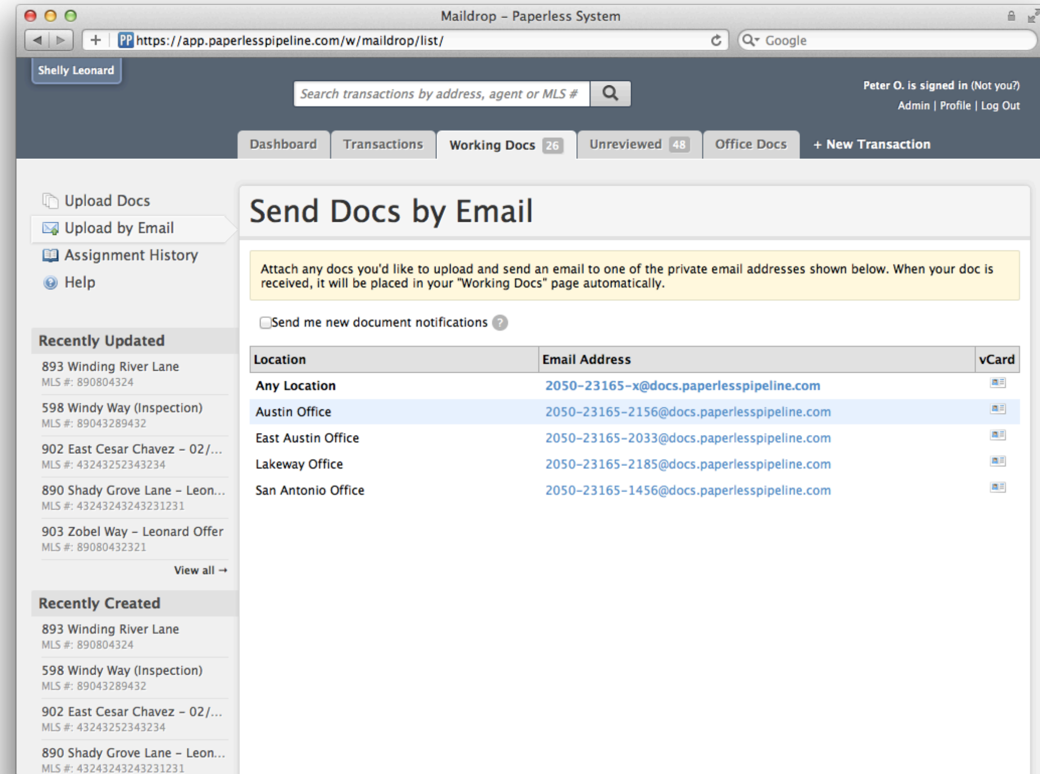
On this page, you’ll see a transaction-specific maildrop address.

Save this to your email contacts so you'll have easy access to it in the future. You can either:

- Copy and paste this email address and save it in your email program and/or scanner OR…
- Click the icon behind it. This will download a vcard that includes the contact information. You can then import this into your email program.

Note: When you send documents to your transaction-specific maildrop address, they will appear in Working Docs until they're assigned to a transaction. If you put a subject in your email, that subject line will be viewable in Working Docs as well.

Alternatively, you can send documents to Working Docs. To do this, go to your Working Docs tab and click on "Upload by Email" on the left side of the page. This will take you to a page that has your Working Docs maildrop address.



When you send docs to this address, it will go into Working Docs, but won't be linked to a transaction.

Assign Docs to a Transaction

After you upload documents to the system, they'll need to be assigned to a transaction and categorized. All docs uploaded to the system will go into Working Docs where they wait to be assigned.

Assign your documents

Go to your Working Docs tab. Here, you'll see a list of all documents you've uploaded that haven't been assigned to a transaction. Behind each document is an "Assign" button.

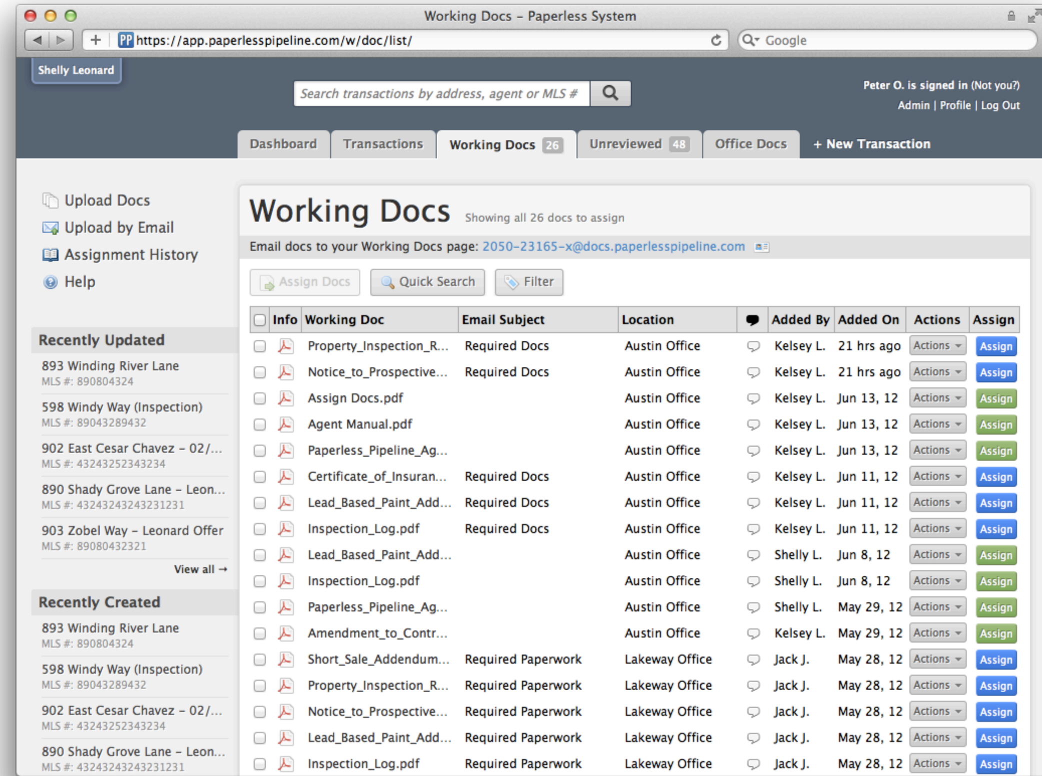
- **If the "Assign" button is blue**
  The doc has been linked to a transaction. You can hover over the "Assign" button to view the property address.

- **If the "Assign" button is green**
  The doc needs to be assigned to a transaction.

You can assign one or multiple docs at a time.

- To assign **only one doc**, click the "Assign" button after the document.

- To assign **multiple documents to the same transaction**, check the checkbox in front of the document name, then click on "Assign Docs" at the top of the page.



Next, you'll be taken to the assignment page. Here, you can rename the doc (if needed), select its category, and select its status.

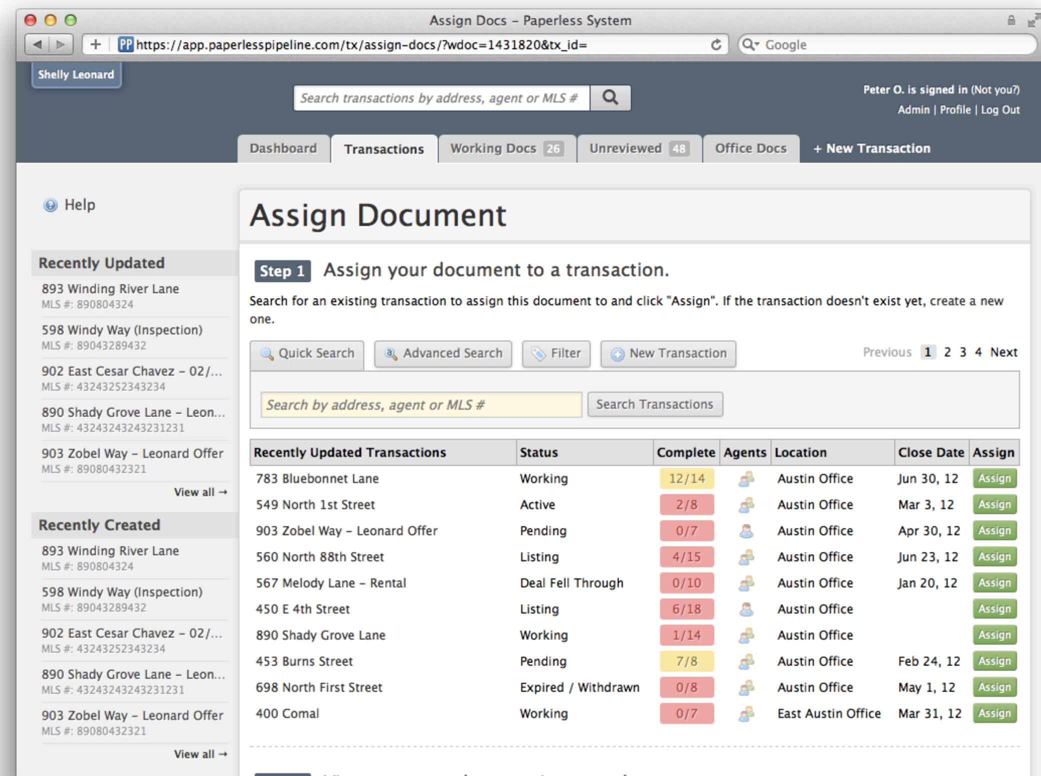
If the doc hasn't been linked to a transaction, you'll need to select the transaction at this time. To find the correct transaction, you can do one of the following:

- Select the property from a list of Recently Updated Transactions
- Search for the property by address, MLS #, or agent
- Use the "Advanced Search" to search by close date, expiration date, or transaction status OR

- Filter by checklist or doc status

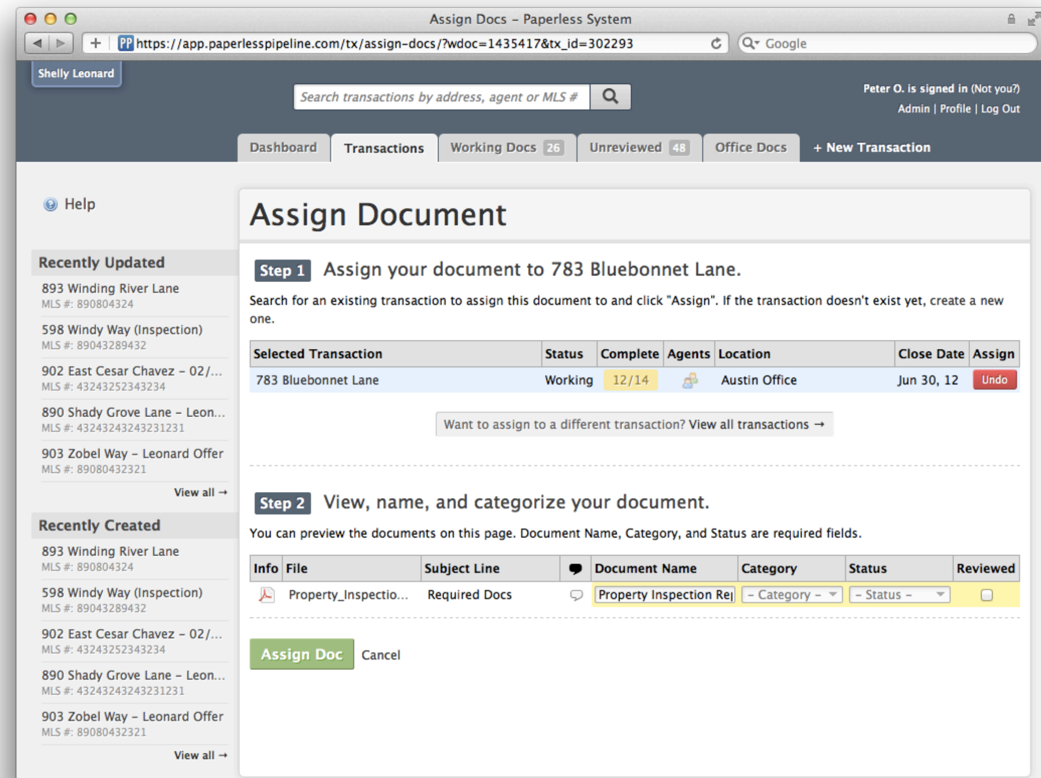
After you find the correct transaction, click “Assign” to the right.

If the doc has been linked to a transaction (you sent it to the transaction-specific maildrop address), the transaction will already be noted for you.



Renaming and Categorizing Your Doc

After you've selected the transaction the document should be assigned to, the next step is to rename the document (if needed) and select its category and status.



Category

The category you choose determines which people involved with the transaction can view it. Depending on your role in the transaction, you'll be able to choose from certain doc categories.

Status

Select the doc status.

Finally, click on "Assign Doc." The document will then be assigned to the transaction you selected.