

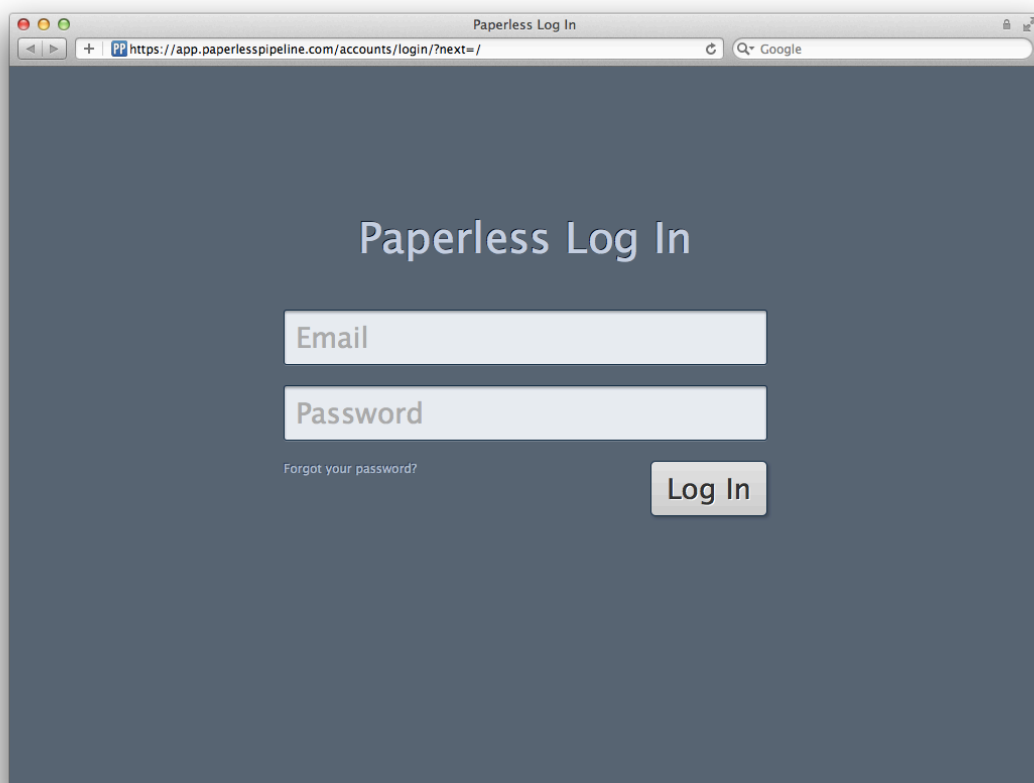
Paperless Pipeline

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.

The screenshot shows the 'Transactions' page in the Paperless System. The page title is 'Transactions - Paperless System' and the URL is 'https://app.paperlesspipeline.com/tx/'. The user is logged in as Peter O. The page has a navigation bar with tabs for Dashboard, Transactions (selected), Working Docs (26), Unreviewed (48), and Office Docs. There is a '+ New Transaction' button. A search bar at the top allows searching by address, agent, or MLS #. The main content area is titled 'Transactions' and shows 'Showing all 49 transactions'. There is a search bar and a 'Filter' button. Below the search bar, there is a note: 'Closed, Cancelled & Deal Fell Through transactions aren't shown below. View all →'. The main table lists transactions with columns: Transaction, Status, Complete, Agents, Location, Close Date, and Actions. The table contains 15 rows of data.

Transaction	Status	Complete	Agents	Location	Close Date	Actions
902 East Cesar Chavez - 02/08/2...	Working			Austin Office	Apr 01, 12	Actions
890 Shady Grove Lane - Leonard O...	Working	3/7		Austin Office		Actions
783 Bluebonnet Lane	Working	12/14		Austin Office	Jun 30, 12	Actions
52224 Balcones Drive	Working	4/13		Austin Office	Jun 30, 12	Actions
890 Shady Grove Lane	Working	1/14		Austin Office		Actions
895 South 1st Street	Working	11/13		Austin Office	Feb 18, 12	Actions
5600 North Henny Lane	Working	7/7		Austin Office	Mar 17, 12	Actions
902 East Cesar Chavez	Working	5/8		Austin Office	Apr 01, 12	Actions
Shelly Test Files	Active			Austin Office		Actions
549 North 1st Street	Active	2/8		Austin Office	Mar 03, 12	Actions
893 Winding River Lane	Listing			Austin Office	Aug 31, 12	Actions
560 North 88th Street	Listing	4/15		Austin Office	Jun 23, 12	Actions
5800 North Lake Blvd	Listing	0/7		Austin Office		Actions
450 E 4th Street	Listing	6/18		Austin Office		Actions

Find a transaction

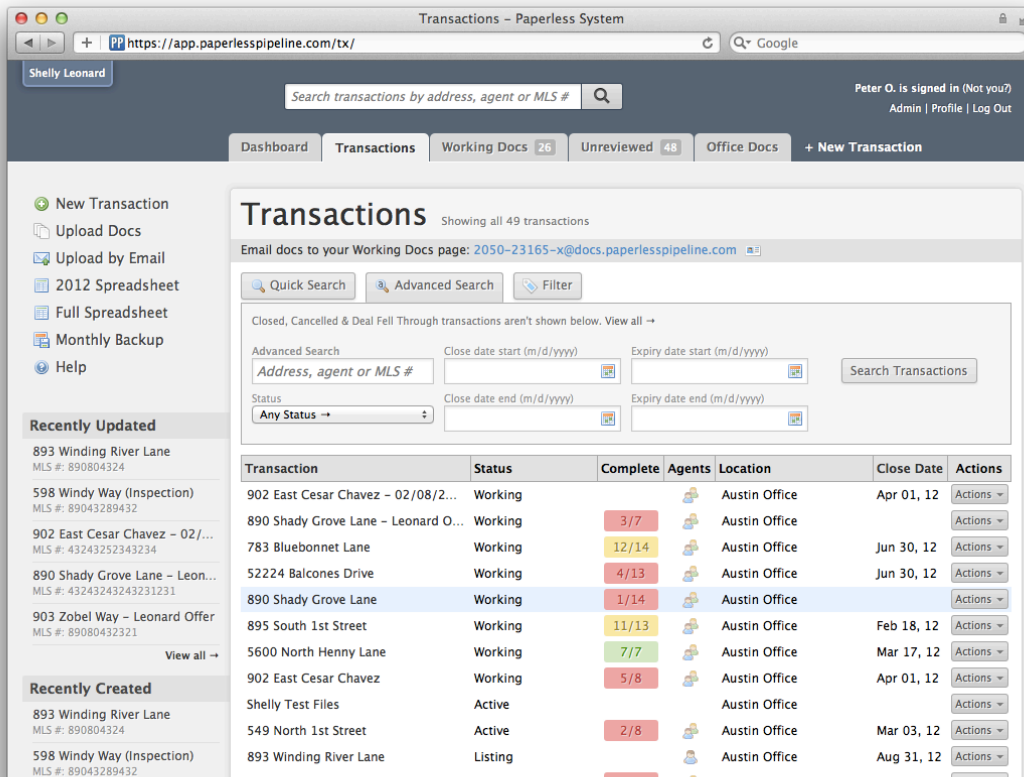
You can find a specific transaction in three different ways:

- **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.

The screenshot displays the 'View Transaction' page for '453 Burns Street' in the Paperless Pipeline system. The page is titled '453 Burns Street' and shows it was last updated on Jun 12, 2012, by Shelly Leonard. A progress indicator shows '88% COMPLETE'. The page is divided into several sections: 'Transaction Info', 'Agents Involved', 'Contacts Involved', and a list of documents. The 'Transaction Info' section includes: MLS #: 432423424, Status: Pending, Location: Austin Office, Close Date: Feb 24, 12, Added On: Feb 13, 12, Added By: Kelsey Leonard, and New Offers: 453 Burns Street - Offer Leona... and 453 Burns Street - Flockhart O... The 'Agents Involved' section lists Listing Agents (Sam Jones) and Selling Agents (Kelsey Leonard). The 'Contacts Involved' section lists Bill Murray (Buyer) and Tom Cruise (Title Company). The document list includes Office Docs and Listing Docs.

Info	Office Docs	Added On	Status	Reviewed	Actions
	Paperless Pipeline Manual - April 2012	Apr 11, 12	Complete	<input checked="" type="checkbox"/>	Actions
	Paperlesspipeline Agent Manual - April 2012	Apr 11, 12	Complete	<input checked="" type="checkbox"/>	Actions
	Reviewing And Entering Docs	Apr 11, 12	Complete	<input checked="" type="checkbox"/>	Actions

Info	Listing Docs	Added On	Status	Reviewed	Actions
	Authorization to Release Information	Feb 17, 12	Complete	<input type="checkbox"/>	Actions

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.

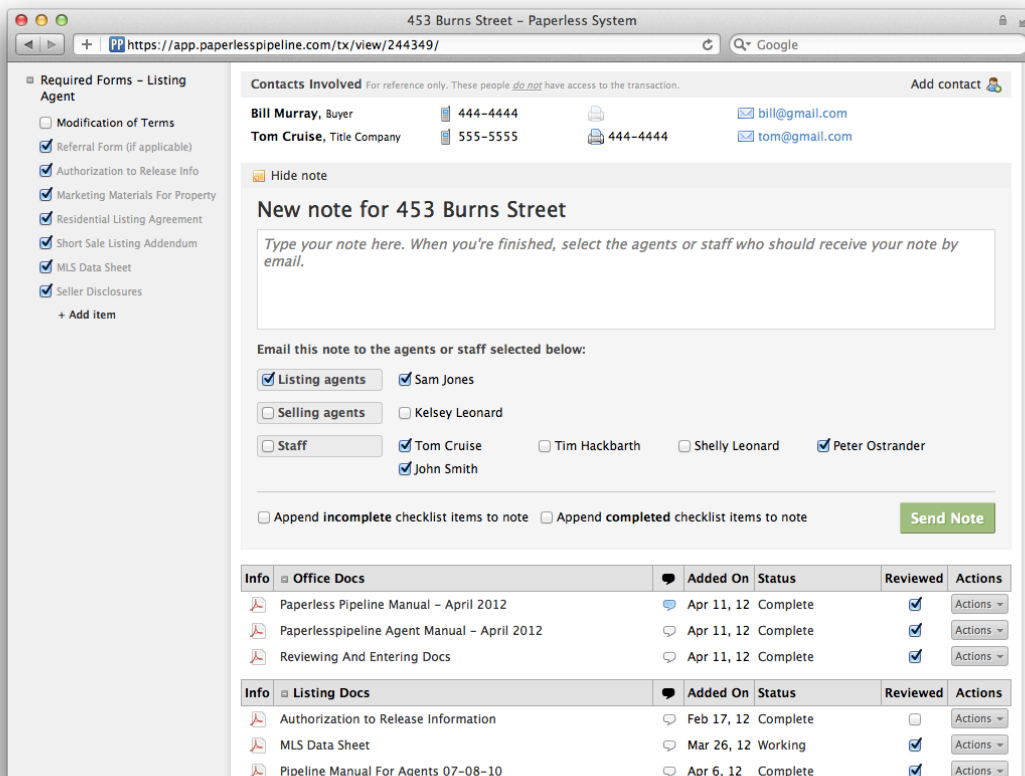
Documents

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.

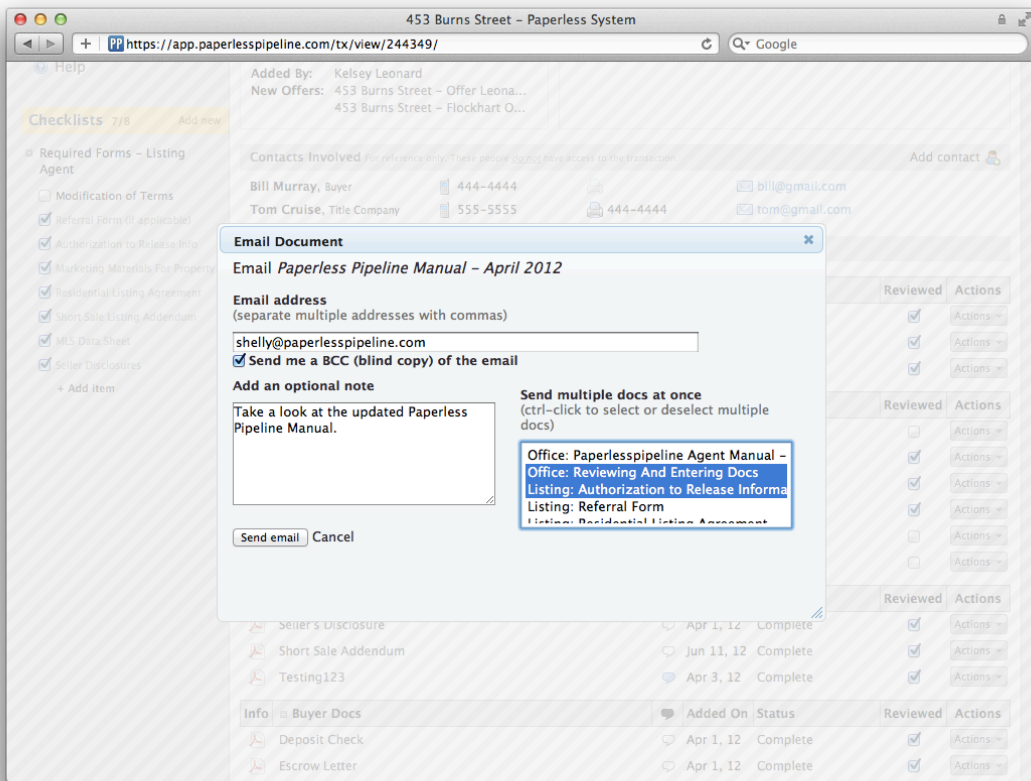
Transaction Notes

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.

The screenshot shows the 'New Transaction' form in the Paperless System. The form is titled 'New Transaction' and is located in the 'Transactions' tab. It contains several sections: 'Transaction Information' with fields for Location (dropdown), Transaction Name or Address (text), MLS or Transaction Number (text), Status (dropdown), and Close Date (text). Below this is an 'Optional Information' section with fields for Automatic Expiration Date (text), Buyer Name (text), and Seller Name (text). The left sidebar shows 'Recently Updated' and 'Recently Created' lists of transactions. The top navigation bar includes 'Dashboard', 'Transactions', 'Working Docs 26', 'Unreviewed 48', 'Office Docs', and '+ New Transaction'.

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:

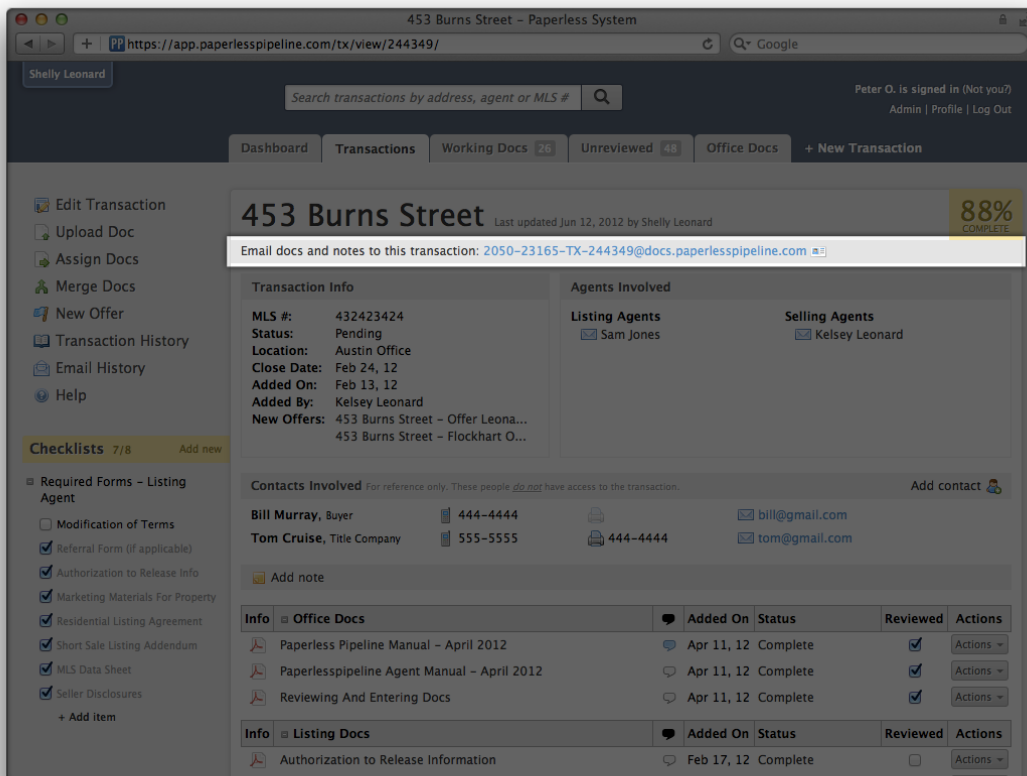
- **Select Multiple Docs**
If you'd like to select multiple documents, hold down CTRL on a Windows computer or ⌘ (Command) on a Mac while clicking individual documents.
- **Docs Upload Immediately**
After you've selected documents, they'll begin uploading immediately. You can cancel pending uploads by 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.

The screenshot shows the 'Maildrop - Paperless System' interface. The main heading is 'Send Docs by Email'. Below the heading is a yellow instruction box: 'Attach any docs you'd like to upload and send an email to one of the private email addresses shown below. When your doc is received, it will be placed in your "Working Docs" page automatically.' There is a checkbox for 'Send me new document notifications'. Below this is a table with columns for 'Location', 'Email Address', and 'vCard'.

Location	Email Address	vCard
Any Location	2050-23165-x@docs.paperlesspipeline.com	
Austin Office	2050-23165-2156@docs.paperlesspipeline.com	
East Austin Office	2050-23165-2033@docs.paperlesspipeline.com	
Lakeway Office	2050-23165-2185@docs.paperlesspipeline.com	
San Antonio Office	2050-23165-1456@docs.paperlesspipeline.com	

On the left sidebar, there are sections for 'Recently Updated' and 'Recently Created' with lists of property addresses and MLS numbers.

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.

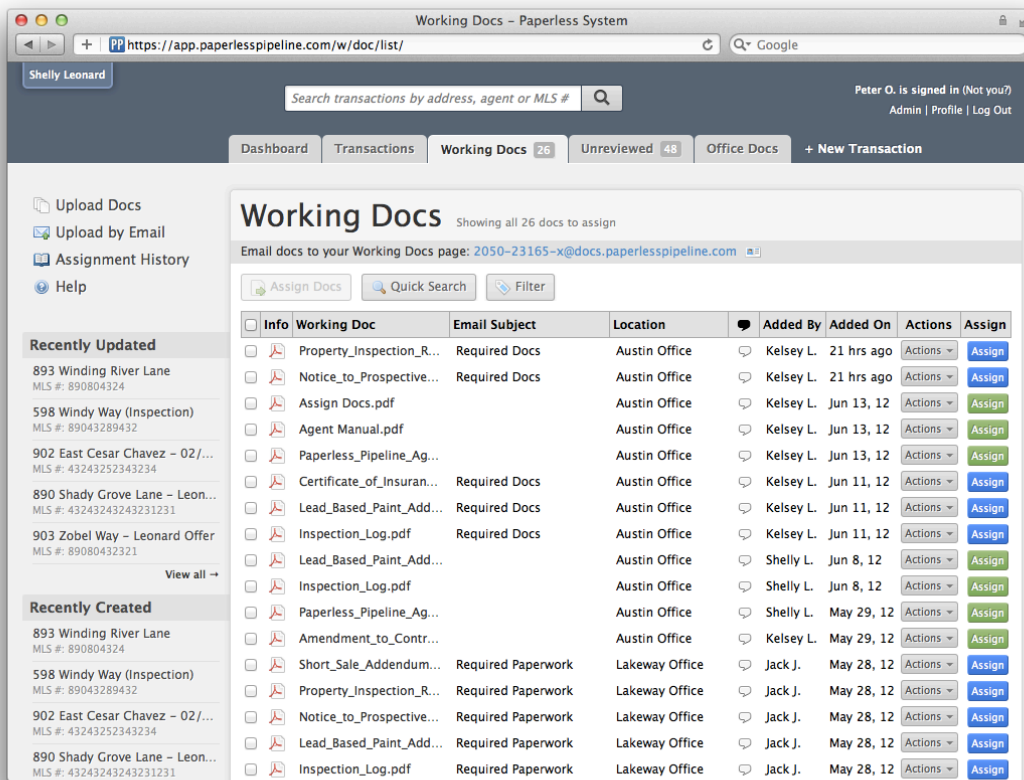
Assign your documents

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.

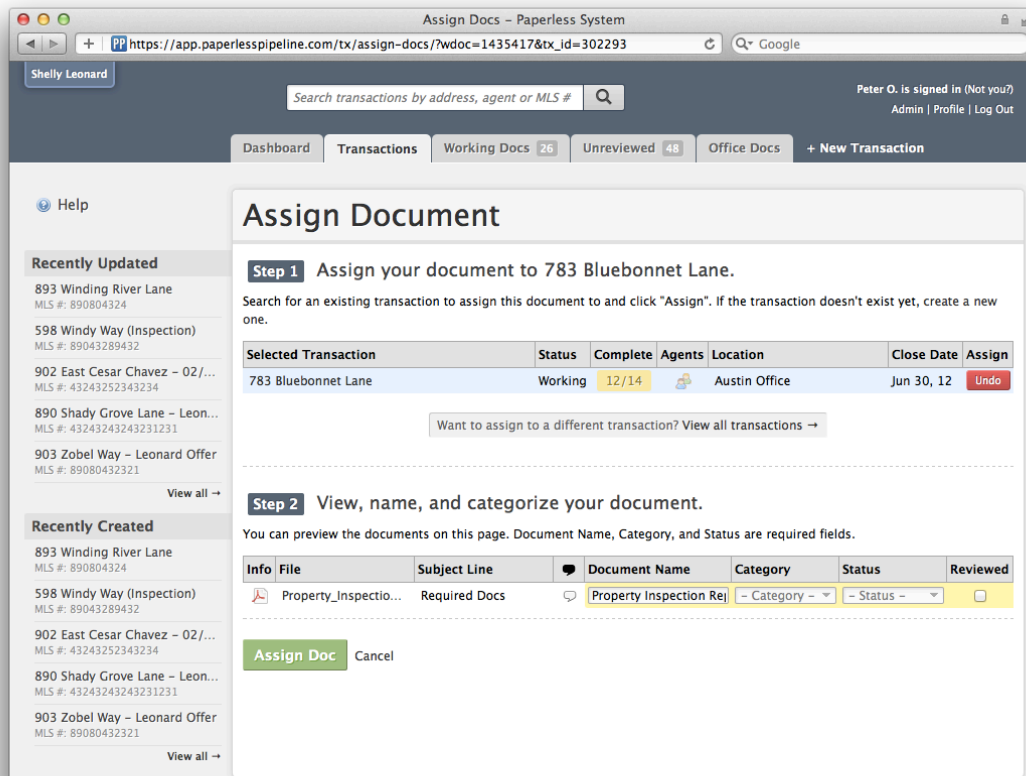
If the doc has been linked to a transaction (you sent it to the transaction-specific maildrop address), the transaction will already be noted for you.

The screenshot shows a web browser window titled "Assign Docs - Paperless System". The URL is https://app.paperlesspipeline.com/tx/assign-docs/?wdoc=1431820&tx_id=. The user is logged in as Peter O. The interface includes a search bar for transactions by address, agent, or MLS #, and navigation tabs for Dashboard, Transactions, Working Docs (26), Unreviewed (48), Office Docs, and a New Transaction button. The main content area is titled "Assign Document" and contains a "Step 1" instruction: "Assign your document to a transaction." Below this is a search bar and a table of "Recently Updated Transactions".

Recently Updated Transactions	Status	Complete	Agents	Location	Close Date	Assign
783 Bluebonnet Lane	Working	12/14	1	Austin Office	Jun 30, 12	Assign
549 North 1st Street	Active	2/8	1	Austin Office	Mar 3, 12	Assign
903 Zobel Way - Leonard Offer	Pending	0/7	1	Austin Office	Apr 30, 12	Assign
560 North 88th Street	Listing	4/15	1	Austin Office	Jun 23, 12	Assign
567 Melody Lane - Rental	Deal Fell Through	0/10	1	Austin Office	Jan 20, 12	Assign
450 E 4th Street	Listing	6/18	1	Austin Office		Assign
890 Shady Grove Lane	Working	1/14	1	Austin Office		Assign
453 Burns Street	Pending	7/8	1	Austin Office	Feb 24, 12	Assign
698 North First Street	Expired / Withdrawn	0/8	1	Austin Office	May 1, 12	Assign
400 Comal	Working	0/7	1	East Austin Office	Mar 31, 12	Assign

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.