Agent Manual

The Basics

Logging In

A welcome email with your username and password has been sent to you. Log in at **app.paperlesspipeline.com** and enter your email and password information.

Forgot your password?

If you forget your password or can't find your welcome email, go to app.paperlesspipeline.com and click on "Forgot Your Password?" On the next screen, enter your email address and click "Reset Password". You will receive an email with detailed instructions on how to reset your password.

Need help?

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

Have a question while using Paperless Pipeline?

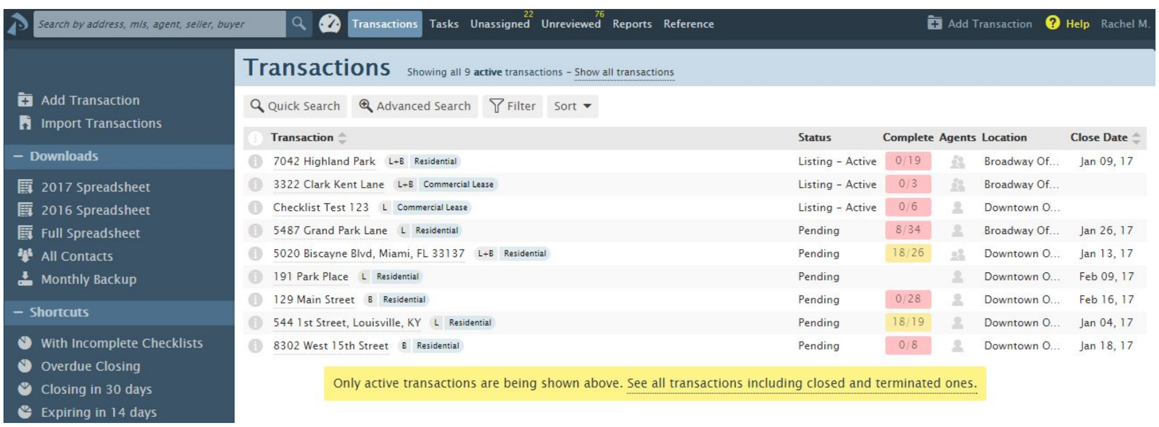
Paperless Pipeline is equipped with page-specific help docs within the application that you can access by clicking the yellow question mark icon in the upper right corner of any page. These help pages include videos, tutorials, and/or answers to commonly asked questions.

You can also get help from a member of our team by clicking the chat box in the bottom right corner of the page.

Viewing Your Transactions

Accessing your transactions

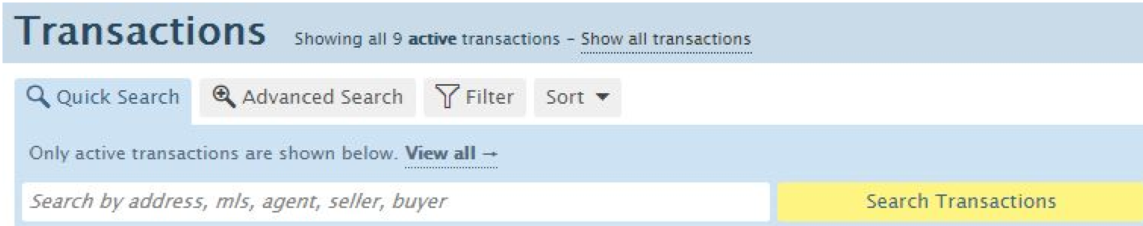
To view a full list of your transactions, go to the Transactions page.



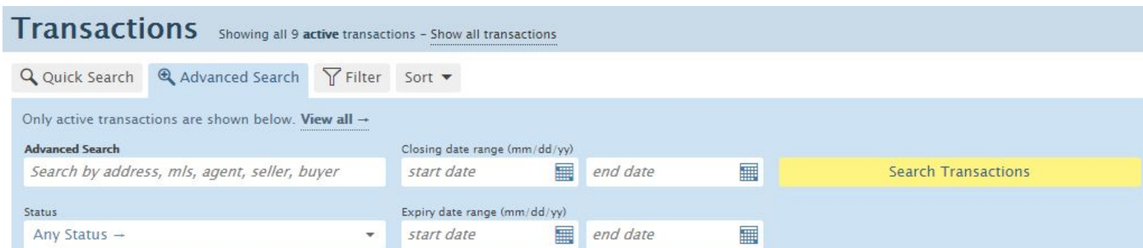
Find a transaction

You can find a specific transaction in three different ways:

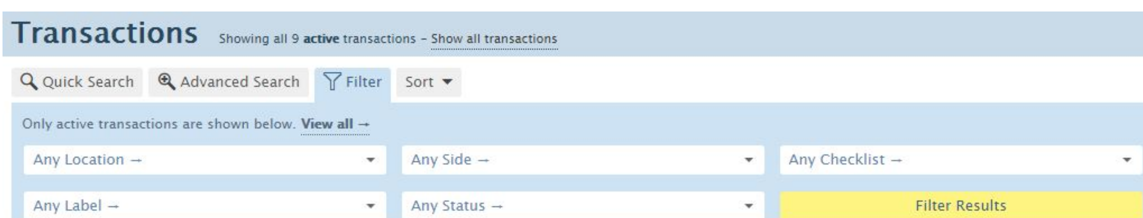
- **Quick Search**
  Click this tab to search by agent, MLS #, property address, seller, or buyer.



- **Advanced Search**
  Click “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.*

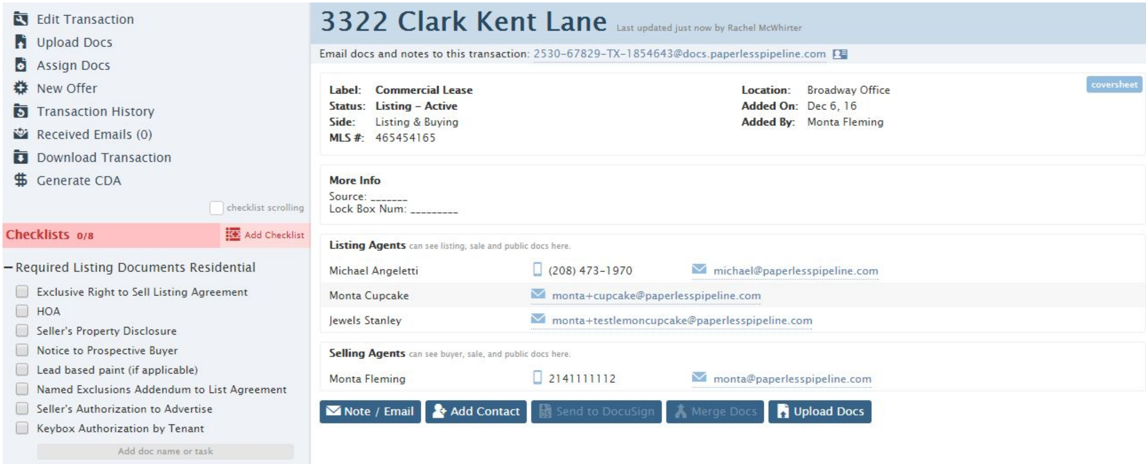


- **Filter**
  Filtering allows you to sort your transactions by location, transaction label, transaction status, and checklist status (incomplete, complete, or no checklist).



View a Transaction

To view a specific transaction, go to the Transactions page and click the transaction’s property address. On this page 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

To add contact information of third parties involved in a transaction (e.g. A rep from the title company), click "Add Contact." and select a role for the contact (or enter a new role). A list of existing contacts for that role will be suggested. Select an existing contact or enter a new one.

Contacts are viewable to anyone who has access to the transaction.

Documents

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

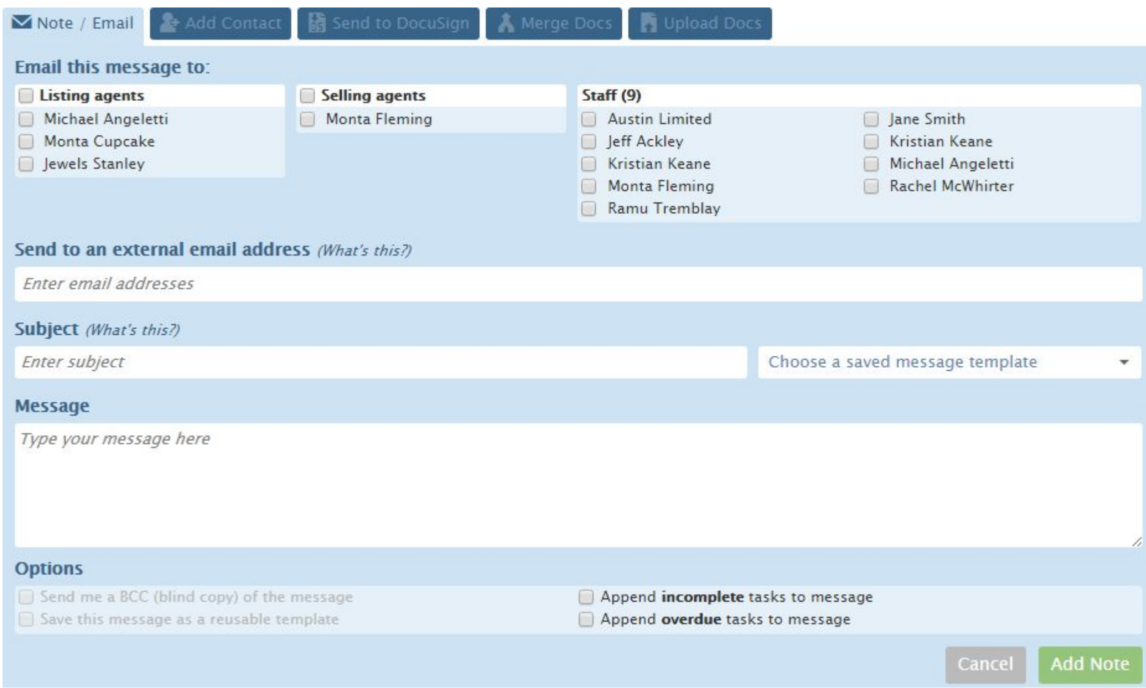
For example: If you're a listing agent, you'll be able to see Listing Docs, Sale Docs, and Public Docs. If you're a selling agent, you'll be able to see Sale Docs, Buyer Docs, and Public Docs.

Sending Notes & Emailing Documents

Transaction notes are the best way to communicate with your internal team and external contacts. To create a note, click on "Email/Note" and the screen will expand to let you enter a message.

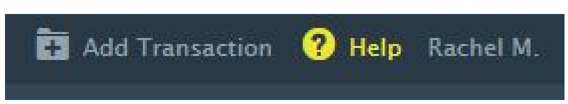
Your office staff, listing, and selling agent are shown as recipients. Check the boxes in front of whom you'd like to send the note You may also send a message to external contacts by dragging a contact onto the message or by typing an email address into the "External Recipients" field. Once you're done, select any other options then click the green button to send your message. The recipients will be emailed and the note will appear in the transaction's Note History.

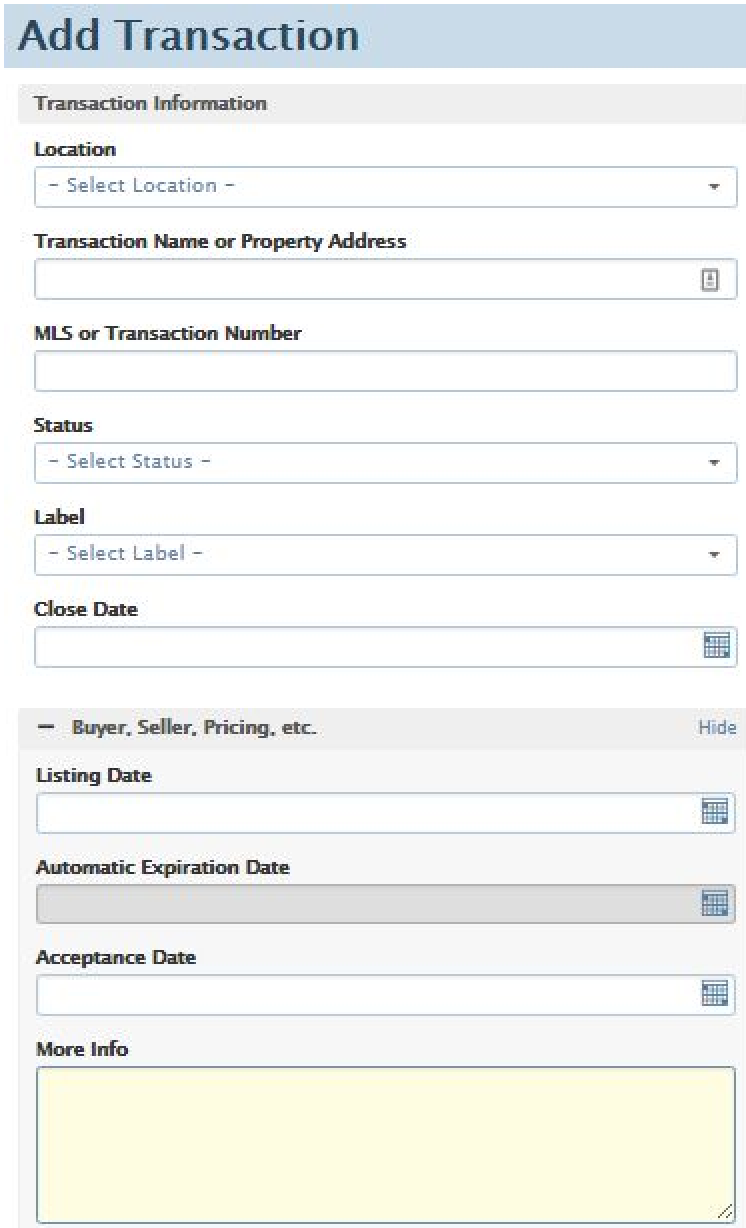
You can optionally attach a document to any message by clicking the checkbox next to any doc.



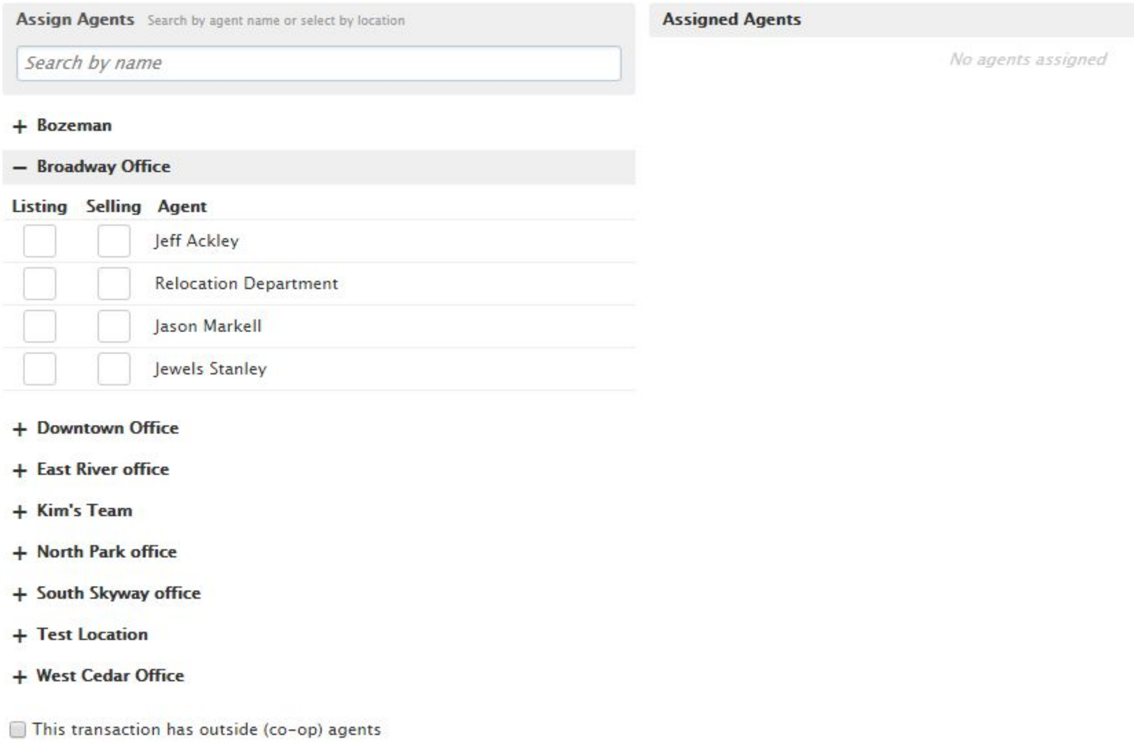
Adding a Transaction

To add a transaction, Click the +Add Transaction link in the upper right corner of the page.





Enter as much information as you currently have then assign yourself as an agent to the transaction.



Find your name by entering all or part of it into the search area. Or click a location to view by location. Check "Listing" or "Selling" to designate your role in the transaction. Assigned agents will appear to the right of the assignment area.

Working with an outside agent?

Check the checkbox at the bottom of the page that says "This transaction has outside (co-op) agents." Fields will appear that allow you to enter the name and email address of the outside listing or selling agent.

When you're finished inputting your transaction information, click "Add Transaction."

Adding Docs to Paperless Pipeline

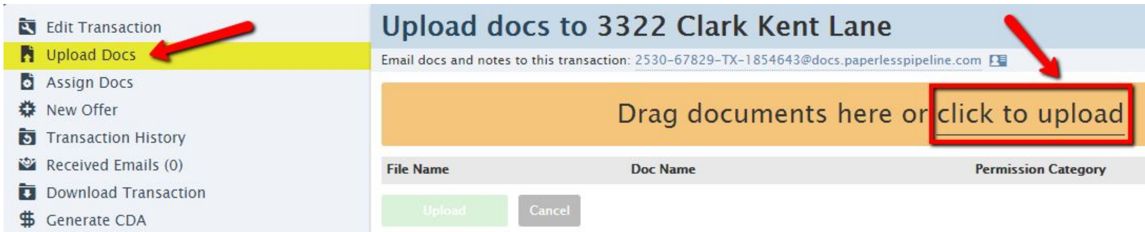
There are two ways to get documents into the system: Uploading and emailing.

Uploading Docs

You can upload to an individual transaction or Unassigned Docs.

- **Upload to an individual transaction**
  Go to a specific transaction's page and click "Upload Docs" from the left

menu. Then click “Click to Upload” to browse your computer.



Select or enter a document name and select the appropriate category for the doc, based on who should have access to it. Then click Upload.

- **Upload to Unassigned Docs**
  Unassigned Docs is the online equivalent of your broker or admin's inbox. It serves as a holding area for all uploaded documents that have not yet been assigned to a transaction. You can also upload your documents directly to Unassigned Docs by going to the “Unassigned Docs” page and selecting “Upload Docs” from the left menu. After they’ve been uploaded, they’ll stay in Unassigned 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 on individual documents.

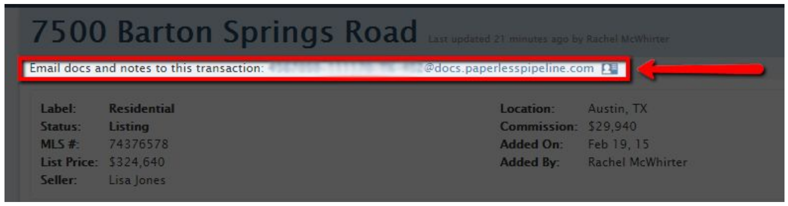
- To take full advantage of bulk uploads (including drag and drop) we recommend you run your paperless system in Google Chrome or Firefox. You could also update your browser to the most current version of Internet Explorer.

Emailing Docs into Paperless Pipeline

You can also email documents directly into Paperless Pipeline using your own, unique maildrop addresses.

Emailing to a Transaction

If you know which transaction the docs need to go to, you can email them to your transaction. To find personal, transaction-specific maildrop addresses, click on the transaction.



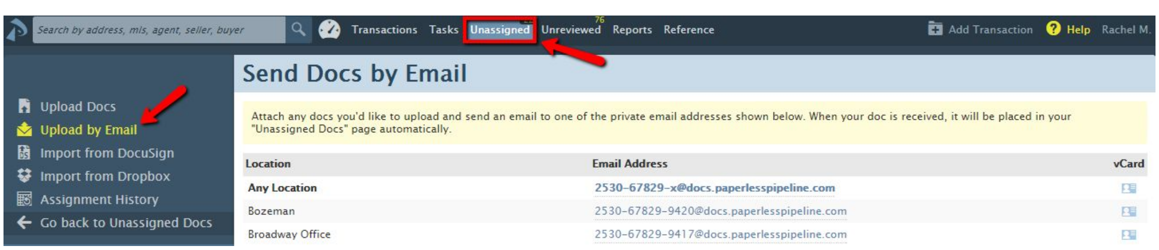
On this page, you'll see your transaction-specific maildrop address. Save this to your email contacts so you'll have easy access to it in the future. You can either:

- 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 Unassigned Docs until they're assigned to a transaction. If you put a subject in your email, that subject line will be viewable in Unassigned Docs as well. Docs mailed to a transaction-specific maildrop address will have a blue assign button and will be linked to the transaction.

Emailing to Unassigned Docs

Alternately, you can email documents to Unassigned Docs. To do this, go to your Unassigned 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 Unassigned Docs maildrop address.



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

Assign Docs to a Transaction

Go to your Unassigned Docs tab. Here, you'll see a list of all documents you've uploaded that haven't been assigned to a transaction. If you have permissions to assign docs, you'll see an "Assign" button next to each document.

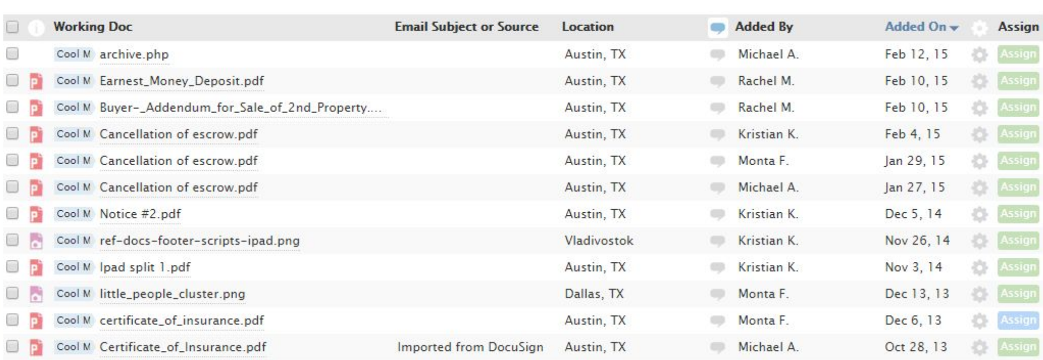
- **If the "Assign" button is blue**
  The doc was emailed to a transaction's maildrop address and is awaiting final assignment to that transaction. You can hover over the "Assign" button to view the transaction.

- **If the "Assign" button is green**
  The document came directly to Unassigned Docs and is not yet associated with a transaction.

You can assign one or multiple docs at a time.

- To assign **only one doc**, click the "Assign" button to the right of the document.

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

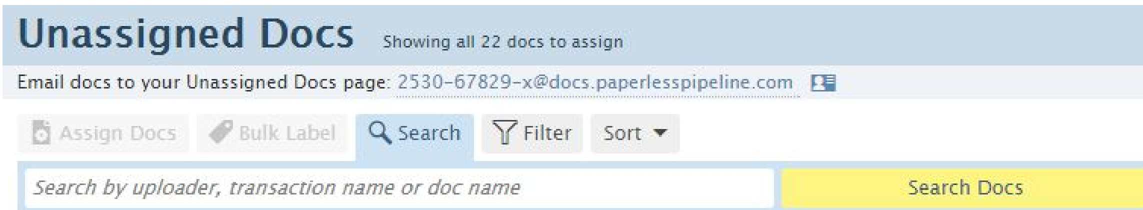


Working Doc	Email Subject or Source	Location	Added By	Added On	Assign
Cool M archive.php		Austin, TX	Michael A.	Feb 12, 15	Assign
Cool M Earnest_Money_Deposit.pdf		Austin, TX	Rachel M.	Feb 10, 15	Assign
Cool M Buyer-_Addendum_for_Sale_of_2nd_Property....		Austin, TX	Rachel M.	Feb 10, 15	Assign
Cool M Cancellation of escrow.pdf		Austin, TX	Kristian K.	Feb 4, 15	Assign
Cool M Cancellation of escrow.pdf		Austin, TX	Monta F.	Jan 29, 15	Assign
Cool M Cancellation of escrow.pdf		Austin, TX	Michael A.	Jan 27, 15	Assign
Cool M Notice #2.pdf		Austin, TX	Kristian K.	Dec 5, 14	Assign
Cool M ref-docs-footer-scripts-ipad.png		Vladivostok	Kristian K.	Nov 26, 14	Assign
Cool M Ipad split 1.pdf		Austin, TX	Kristian K.	Nov 3, 14	Assign
Cool M little_people_cluster.png		Dallas, TX	Monta F.	Dec 13, 13	Assign
Cool M certificate_of_insurance.pdf		Austin, TX	Monta F.	Dec 6, 13	Assign
Cool M Certificate_of_Insurance.pdf	Imported from DocuSign	Austin, TX	Michael A.	Oct 28, 13	Assign

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

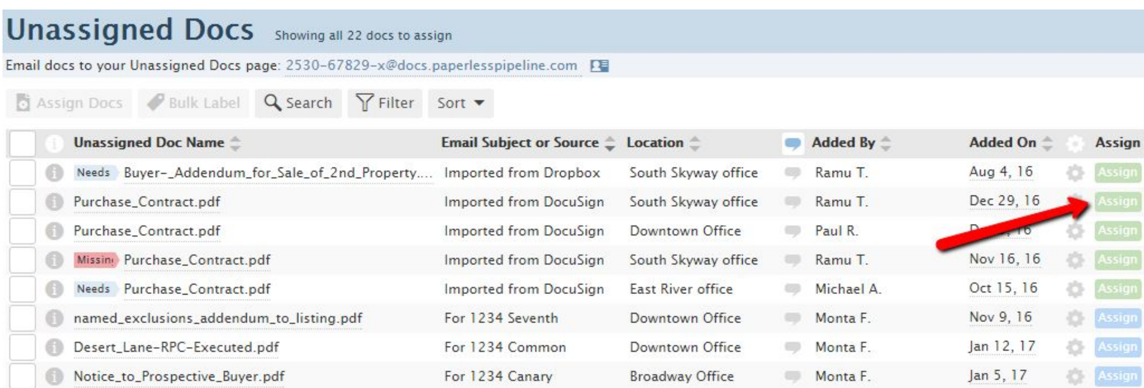
If the doc hasn't been linked to a transaction, you'll need to select the transaction at this time. To find the correct transaction, you can do one of the following:

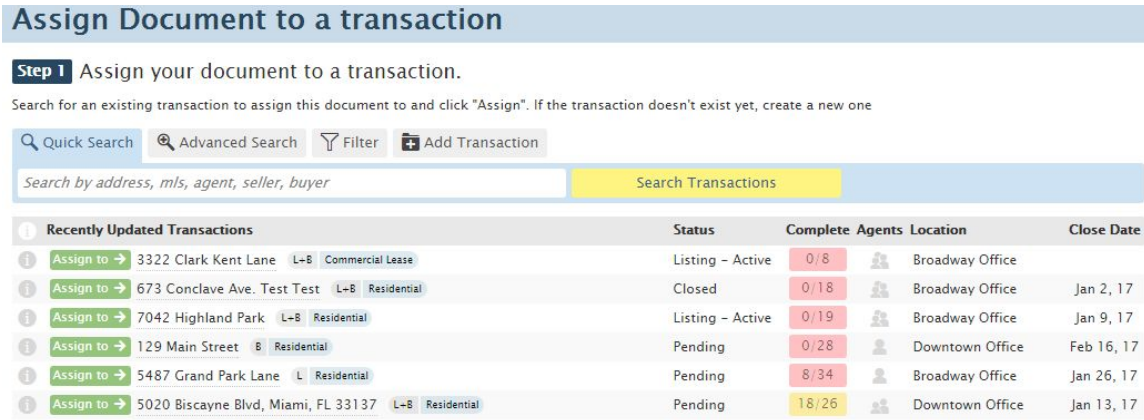
- Select the property from the list of Recently Updated Transactions
- Search for the transaction using one of the search or filter options



- Add a new transaction (if you have permission to add new transactions).

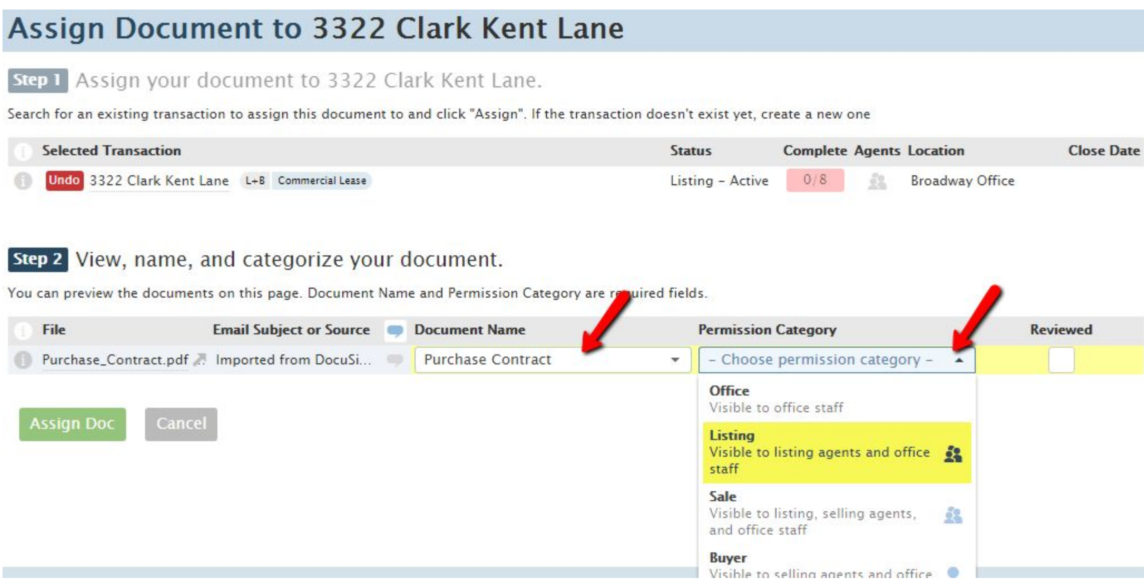
If assigning documents to an already existing transaction, once you find the transaction, click the green assign button to the right of the transaction.





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

Rename the document (if needed) and select its category.



The category you choose determines which people involved with the transaction can view it.