

Paperless Pipeline

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.



Paperless Pipeline
simplify your transaction management

Secure Login

Email

Password

[Forgot your password?](#)

Log In

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?

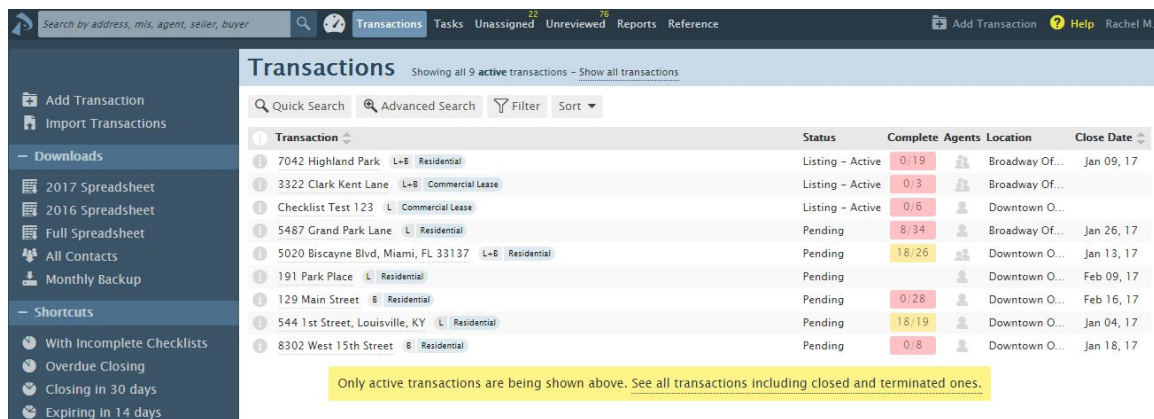
Paperless Pipeline is equipped with page-specific help docs within the application that you can access by clicking the yellow question mark icon in the upper right corner of any page. These help pages include videos, tutorials, and/or answers to commonly asked questions.

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.



The screenshot displays the 'Transactions' page in the Paperless Pipeline application. The interface includes a search bar at the top with the text 'Search by address, mls, agent, seller, buyer'. Below the search bar, there are tabs for 'Transactions', 'Tasks', 'Unassigned', 'Unreviewed', 'Reports', and 'Reference'. The 'Transactions' tab is active, showing a list of 9 active transactions. The table has columns for 'Transaction', 'Status', 'Complete', 'Agents', 'Location', and 'Close Date'. A yellow highlight is under a note at the bottom: 'Only active transactions are being shown above. See all transactions including closed and terminated ones.'

Transaction	Status	Complete	Agents	Location	Close Date
7042 Highland Park L-B Residential	Listing - Active	0/19		Broadway Of...	Jan 09, 17
3322 Clark Kent Lane L-B Commercial Lease	Listing - Active	0/3		Broadway Of...	
Checklist Test 123 L Commercial Lease	Listing - Active	0/6		Downtown O...	
5487 Grand Park Lane L Residential	Pending	8/34		Broadway Of...	Jan 26, 17
5020 Biscayne Blvd, Miami, FL 33137 L-B Residential	Pending	18/26		Downtown O...	Jan 13, 17
191 Park Place L Residential	Pending			Downtown O...	Feb 09, 17
129 Main Street B Residential	Pending	0/28		Downtown O...	Feb 16, 17
544 1st Street, Louisville, KY L Residential	Pending	18/19		Downtown O...	Jan 04, 17
8302 West 15th Street B Residential	Pending	0/8		Downtown O...	Jan 18, 17

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.

Transactions Showing all 9 active transactions - [Show all transactions](#)

Quick Search Advanced Search Filter Sort

Only active transactions are shown below. [View all](#)

Search by address, mls, agent, seller, buyer Search Transactions

- **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.*

Transactions Showing all 9 active transactions - [Show all transactions](#)

Quick Search Advanced Search Filter Sort

Only active transactions are shown below. [View all](#)

Advanced Search

Search by address, mls, agent, seller, buyer Closing date range (mm/dd/yy)

start date end date Search Transactions

Status Expiry date range (mm/dd/yy)

Any Status → start date end date

- **Filter**

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

Transactions Showing all 9 active transactions - [Show all transactions](#)

Quick Search Advanced Search Filter Sort

Only active transactions are shown below. [View all](#)

Any Location → Any Side → Any Checklist →

Any Label → Any Status → Filter Results

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 & E-mailing 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.

Note / Email Add Contact Send to DocuSign Merge Docs Upload Docs

Email this message to:

- Listing agents
 - Michael Angeletti
 - Monta Cupcake
 - Jewels Stanley
- Selling agents
 - Monta Fleming
- Staff (9)
 - Austin Limited
 - Jeff Ackley
 - Kristian Keane
 - Monta Fleming
 - Ramu Tremblay
 - Jane Smith
 - Kristian Keane
 - Michael Angeletti
 - Rachel McWhirter

Send to an external email address (What's this?)
Enter email addresses

Subject (What's this?)
Enter subject Choose a saved message template

Message
Type your message here

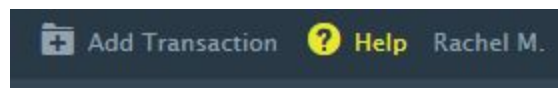
Options

- Send me a BCC (blind copy) of the message
- Append **incomplete** tasks to message
- Save this message as a reusable template
- Append **overdue** tasks to message

Cancel Add Note

Adding a Transaction

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



Add Transaction

Transaction Information

Location
- Select Location -

Transaction Name or Property Address

MLS or Transaction Number

Status
- Select Status -

Label
- Select Label -

Close Date

Buyer, Seller, Pricing, etc. Hide

Listing Date

Automatic Expiration Date

Acceptance Date

More Info

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

Assign Agents <small>Search by agent name or select by location</small>			Assigned Agents
<input type="text" value="Search by name"/>			<i>No agents assigned</i>
+ Bozeman			
- Broadway Office			
Listing	Selling	Agent	
<input type="checkbox"/>	<input type="checkbox"/>	Jeff Ackley	
<input type="checkbox"/>	<input type="checkbox"/>	Relocation Department	
<input type="checkbox"/>	<input type="checkbox"/>	Jason Markell	
<input type="checkbox"/>	<input type="checkbox"/>	Jewels Stanley	
+ Downtown Office			
+ East River office			
+ Kim's Team			
+ North Park office			
+ South Skyway office			
+ Test Location			
+ West Cedar Office			
<input type="checkbox"/> This transaction has outside (co-op) agents			

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

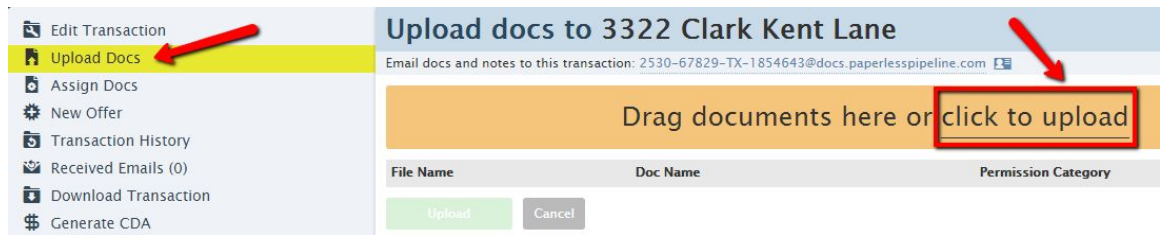
There are two ways to get documents into the system: Uploading and emailing.

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](#).

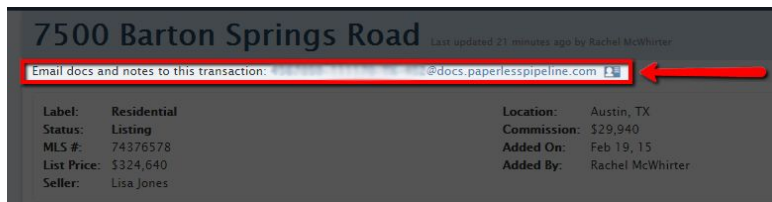
Emailing Docs into Paperless Pipeline

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:

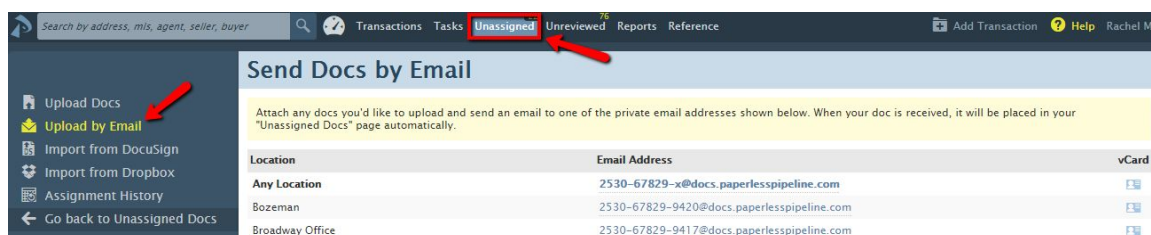
- Copy and paste this email address and save it in your email program and/or scanner OR...
- Click the icon behind it. This will download a vcard that includes the contact information. You can then import this into your email program.

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.

Document Name	Location	Agent	Date	Action
Cool M Buyer--Addendum_for_Sale_of_2nd_Property.pdf	Austin, TX	Rachel M.	Feb 10, 15	Assign
Century_Village_(1).pdf	Austin, TX	Shelly L.	Aug 31, 12	Assign
Cool M certificate_of_insurance.pdf	Austin, TX	Monta F.		Assign
Cool M Certificate_of_Insurance.pdf	Imported from DocuSign Austin, TX	Michael A.	Oct 28, 13	Assign

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.

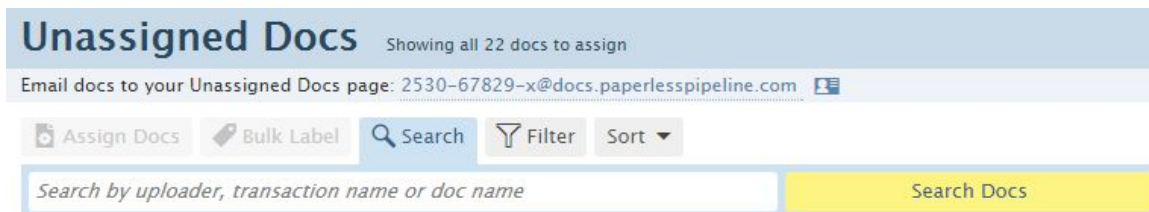
- To assign **only one doc**, click the "Assign" button to the right of the document.
- To assign **multiple documents to the same transaction**, check the checkbox to the left of the document name, then click on "Assign Docs" at the top of the page.

<input type="checkbox"/>	Working Doc	Email Subject or Source	Location	Added By	Added On	Assign
<input type="checkbox"/>	Cool M archive.php		Austin, TX	Michael A.	Feb 12, 15	Assign
<input type="checkbox"/>	Cool M Earnest_Money_Deposit.pdf		Austin, TX	Rachel M.	Feb 10, 15	Assign
<input type="checkbox"/>	Cool M Buyer_Addendum_for_Sale_of_2nd_Property....		Austin, TX	Rachel M.	Feb 10, 15	Assign
<input type="checkbox"/>	Cool M Cancellation of escrow.pdf		Austin, TX	Kristian K.	Feb 4, 15	Assign
<input type="checkbox"/>	Cool M Cancellation of escrow.pdf		Austin, TX	Monta F.	Jan 29, 15	Assign
<input type="checkbox"/>	Cool M Cancellation of escrow.pdf		Austin, TX	Michael A.	Jan 27, 15	Assign
<input type="checkbox"/>	Cool M Notice #2.pdf		Austin, TX	Kristian K.	Dec 5, 14	Assign
<input type="checkbox"/>	Cool M ref-docs-footer-scripts-ipad.png		Vladivostok	Kristian K.	Nov 26, 14	Assign
<input type="checkbox"/>	Cool M Ipad split 1.pdf		Austin, TX	Kristian K.	Nov 3, 14	Assign
<input type="checkbox"/>	Cool M little_people_cluster.png		Dallas, TX	Monta F.	Dec 13, 13	Assign
<input type="checkbox"/>	Cool M certificate_of_insurance.pdf		Austin, TX	Monta F.	Dec 6, 13	Assign
<input type="checkbox"/>	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.

The screenshot shows the 'Unassigned Docs' interface with a list of documents. A red arrow points to the 'Assign' button for the document 'Purchase_Contract.pdf'.

<input type="checkbox"/>	Unassigned Doc Name	Email Subject or Source	Location	Added By	Added On	Assign
<input type="checkbox"/>	<i>Needs</i> Buyer_Addendum_for_Sale_of_2nd_Property....	Imported from Dropbox	South Skyway office	Ramu T.	Aug 4, 16	Assign
<input type="checkbox"/>	Purchase_Contract.pdf	Imported from DocuSign	South Skyway office	Ramu T.	Dec 29, 16	Assign
<input type="checkbox"/>	Purchase_Contract.pdf	Imported from DocuSign	Downtown Office	Paul R.	Dec 29, 16	Assign
<input type="checkbox"/>	<i>Missing</i> Purchase_Contract.pdf	Imported from DocuSign	South Skyway office	Ramu T.	Nov 16, 16	Assign
<input type="checkbox"/>	<i>Needs</i> Purchase_Contract.pdf	Imported from DocuSign	East River office	Michael A.	Oct 15, 16	Assign
<input type="checkbox"/>	named_exclusions_addendum_to_listing.pdf	For 1234 Seventh	Downtown Office	Monta F.	Nov 9, 16	Assign
<input type="checkbox"/>	Desert_Lane-RPC-Executed.pdf	For 1234 Common	Downtown Office	Monta F.	Jan 12, 17	Assign
<input type="checkbox"/>	Notice_to_Prospective_Buyer.pdf	For 1234 Canary	Broadway Office	Monta F.	Jan 5, 17	Assign

Assign Document to a transaction

Step 1 Assign your document to a transaction.

Search for an existing transaction to assign this document to and click "Assign". If the transaction doesn't exist yet, create a new one

Quick Search Advanced Search Filter Add Transaction

Search by address, mls, agent, seller, buyer Search Transactions

Recently Updated Transactions	Status	Complete	Agents	Location	Close Date
Assign to → 3322 Clark Kent Lane L+B Commercial Lease	Listing - Active	0/8	2	Broadway Office	
Assign to → 673 Conclave Ave. Test Test L+B Residential	Closed	0/18	2	Broadway Office	Jan 2, 17
Assign to → 7042 Highland Park L+B Residential	Listing - Active	0/19	2	Broadway Office	Jan 9, 17
Assign to → 129 Main Street B Residential	Pending	0/28	2	Downtown Office	Feb 16, 17
Assign to → 5487 Grand Park Lane L Residential	Pending	8/34	2	Broadway Office	Jan 26, 17
Assign to → 5020 Biscayne Blvd, Miami, FL 33137 L+B Residential	Pending	18/26	2	Downtown Office	Jan 13, 17

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.

Assign Document to 3322 Clark Kent Lane

Step 1 Assign your document to 3322 Clark Kent Lane.

Search for an existing transaction to assign this document to and click "Assign". If the transaction doesn't exist yet, create a new one

Selected Transaction	Status	Complete	Agents	Location	Close Date
Undo 3322 Clark Kent Lane L+B Commercial Lease	Listing - Active	0/8	2	Broadway Office	

Step 2 View, name, and categorize your document.

You can preview the documents on this page. Document Name and Permission Category are required fields.

File	Email Subject or Source	Document Name	Permission Category	Reviewed
Purchase_Contract.pdf	Imported from DocuSi...	Purchase Contract	- Choose permission category -	<input type="checkbox"/>

Assign Doc Cancel

- Office**
Visible to office staff
- Listing**
Visible to listing agents and office staff
- Sale**
Visible to listing, selling agents, and office staff
- Buyer**
Visible to selling agents and office

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