Paperless Pipeline

For agents

Agent Quick Start

Six parts. One afternoon.

How to get in, get your paperwork where your office can find it, work your deals, and see what you have earned. Each part says where to click. The help site goes deeper when you want it.

1 Getting Into Pipeline

2 Getting Your Documents In

3 Your Transactions

4 Your Tasks and Reminders

5 Your Commission

6 Working From Your Phone

Sign in at app.paperlesspipeline.com · help@paperlesspipeline.com · September 2026. Your office decides which of these you can do; a greyed-out control or a missing button is a permission, not an error.

PART 1

Getting Into Pipeline

One email address gets you in, and it is the same address your Pipeline mail goes out from.

1 Sign in for the first time

Your office adds you and sends a welcome email. Your access is tied to that address, so sign in with it every time.

1. Open the welcome email and click the link to set your password.
2. Go to app.paperlesspipeline.com.
3. Enter your email address and password, then click [Log In]. Check [Stay logged in for 7 days] if you like.

2 Changed firms? Free up your address, or use an alias

Pipeline has no separate username, so one address belongs to one profile. If your new office is told your email already exists, your old profile still holds it. You have three ways through.

1. Done with the old firm: ask them to deactivate you. That releases the address and your new office adds you with it.
2. Or email us at help@paperlesspipeline.com from that address and we will deactivate the old profile for you.
3. Still need both accounts: make an alias by adding + and a word before the @ (marci@yourbrokerage.com becomes marci+pp2@yourbrokerage.com). It delivers to the inbox you already read. Give the alias to your new office and they add you today. A second email address works too, but then you have two inboxes to watch.

3 Set a password when you never had one

The change-password form asks for your current password, so use the reset instead.

1. Go to app.paperlesspipeline.com and click [Forgot your password?].
2. Enter your email address, then click [Send Reset Email].
3. Open the reset email (it arrives within 15 minutes), click the link, enter a new password twice, then click [Change Password].
4. To change a password you know: click the [Gear] in the upper-right, then [My Info], enter the current and new passwords, then [Save Settings].

4

Know where to ask

Two people can help. Your office answers how things are done here; our team answers how Pipeline works.

1. For Pipeline questions: click [Help] in the top-right corner, then [Get Help], or email help@paperlesspipeline.com.
2. For your office's process: the admin and support contact listed on your Home page.

More on the help site: Getting Into Pipeline | Login · Password Reset · Get Help

PART 2

Getting Your Documents In

Every document you file gets there one of two ways: you upload it, or you email it. Both record it as coming from you.

1 Start from the office's own forms

Your office's blank forms and disclosures sit on the Reference page, one copy for everyone.

1. Click [Reference] in the top menu.
2. Click [+] to the left of a category, then the [Gear] to the right of the doc, then [Download].
3. Or click [Search] at the top of the page, type the doc's name, then click [Search Docs].

2 Upload from your computer

Drag a whole stack in at once. A greyed-out upload area on a transaction is a permission on the file, not a problem with the document.

1. Open the transaction, then click [Upload Docs] in the left menu.
2. Drag your files onto the Drag docs here area, or click to choose them.
3. Confirm each doc's name, choose a permission category for each, then click [Upload Docs].
4. No transaction yet? Click [Unassigned] in the top menu, then [Upload Docs], choose the location, then [Upload Docs].

3 Email documents in from anywhere

Every transaction has its own maildrop address, and so does your Unassigned queue.

1. Find the address: it is printed below a transaction's title, and near the top of the Unassigned page.
2. Save it in your phone and mail app as a contact called Pipeline Maildrop.
3. Start a new email or forward one, put the maildrop address in the To field, attach the file itself (a Drive or OneDrive link arrives as a link), then send.

4 See that it arrived

Everything emailed in lands in Unassigned first, under the subject line it came in with.

1. Click [Unassigned] in the top menu.
2. Read the Email Subject or Source column for how it arrived, and Added by for whose address it came through.
3. Hold your cursor over a blue [Assign] button to see which transaction the doc is already tied to.

5 File it, or leave it for your office

Assigning puts a doc on its transaction and sets who can open it. In many offices staff do this part. If you see an Assign button, it is yours to do.

1. On the Unassigned page, click [Assign] to the right of the doc.
2. Choose the transaction by clicking its [Assign] button. If it is not listed, search for it.
3. Confirm the doc name, choose a permission category, then click [Assign Doc].

6 Know it arrived without looking

Turn this on once and every email you send to your maildrop gets a reply saying what uploaded and what was refused, and why.

1. Click the [Gear] in the upper-right corner, then [My Info].
2. Under Your Email Settings, check Receive email acknowledgement whenever you send in docs to your maildrop.
3. Click [Save Settings].

More on the help site: Getting Your Documents In | Reference List · Uploading Docs · Maildrop · Unassigned Docs List · Doc Assignment · Email Acknowledgement

PART 3

Your Transactions

The deals you are on are the deals you can open. Access comes from being assigned to a transaction, not from creating it or emailing to it.

1

Find the deals you are on

Your list holds the files you have access to and nothing else, so it is shorter than your admin's.

1. Click [Transactions] in the top menu.
2. Click [Columns], check the columns you want, then click [Done]. It opens that way from then on.
3. Closed, expired and canceled deals are hidden. Click [View All] to see them.

2

Open a file when a deal starts

If your office has turned this on for you, a status and a label are all it needs to save.

1. Click [+ Add Transaction] in the upper-right corner of any page (or press Ctrl+Alt+T on Windows, Ctrl+Opt+T on a Mac).
2. Enter what you have. Name the transaction the way your office asks; the reminder under the name field tells you.
3. Check your name on the Listing or Buying side, then save. The file is yours from that moment.

3

Record the other side's agent

The agent at the other brokerage goes on the same form, for reference. They get no access.

1. Open the transaction, then click [Edit Transaction] in the left menu.
2. In Assign Agents, check [This transaction has outside (co-op) agents].
3. Enter their name, email and phone on the side they represent, then save.

4

Keep it current

The details are the deal: its dates, its price, the people on it. Anything your office has locked will show but not take an edit; your admin can change it.

1. Open the transaction, then click [Edit Transaction] in the left menu.
2. Change what you need, then save.

5

Put the people on the file

The escrow officer, the lender and your own buyer or seller belong on the transaction, where the next person to open it can find them. A contact gives nobody a login.

1. On the transaction, click [+ Add Contact] above the Docs section.
2. Fill in the Role and Name, add whatever else you have, then click [Add Contact].

6 Keep the conversation on the deal

One composer sends an email to your office or an outside address, or leaves a note that goes to no one. Either way it stays on the transaction with the docs it was about.

1. On the transaction, scroll down and click [Note / Email], just above the Documents area.
2. Check each internal recipient, or type an outside address in Send To An External Email Address. Check any docs to attach.
3. Enter a subject and your message, then click [Send Email]. Leave every recipient unchecked and click [Add Note] instead to keep it as a note.

7 Understand why a file is yours

A file you are not on does not appear at all. If a deal you expect is missing, you are not assigned to it yet.

1. Ask your office to assign you, rather than searching for it. The admin and support contact on your Home page is the person to ask.

More on the help site: Your Transactions | Transactions List · Adding a Transaction · Outside (Co-op) Agents · Transaction Details · Adding a Contact · Composing an Email

PART 4

Your Tasks and Reminders

Your tasks are the office's checklist as it applies to you. Checking one off tells them you have done your part.

1

Work from one list across every deal

Every task with a due date, across all your transactions, on one page.

1. Click [Tasks] in the top menu.
2. Click [Columns] to choose what you see, then [Done].

2

Check off your own tasks

Your check marks the task done on your end and flags it for your admin. It stays open on their list until they sign it off, which is the process working. If the boxes are not yours to tick, your office has left check-off to staff.

1. On the Tasks page, click the checkbox to the right of the task's name.
2. Or open the transaction and click the checkbox beside the task on its checklist.

3

Get the day's deadlines by email

One email each morning with what is overdue, due today and due tomorrow. It covers your tasks, not the whole office's.

1. Click the [Gear] in the upper-right corner, then [My Info].
2. Click Receive daily email with upcoming tasks to turn it on or off, then click [Save].

4

Add a checklist the office did not

Most checklists land on a file by themselves. When one did not, and your office has given you the permission, you can add it.

1. Open the transaction and go to the Checklists area in the left menu.
2. Click [+] at the top of the Checklists area, then pick the checklist from the list.

More on the help site: Your Tasks and Reminders | Tasks List · Agent Checked Tasks · Daily Task Reminder Emails · Applying a Checklist

PART 5

Your Commission

Commissions are an add-on your brokerage switches on, so this part applies if your office uses it. Your report carries nobody else's numbers.

1 See what a deal is worth

Once your office has entered commissions, what you are owed sits on the transaction itself.

1. Open the transaction and scroll to the Financial Info section.
2. Click the [download] link to the right of the section for your Commission & Fees Statement for that deal.

2 Pull your own commission history

It is in your own profile, and it is the report to run when you want to know how close you are to your cap.

1. Click the [Gear] in the upper-right corner, then [My Info].
2. Click [Your Commissions] in the left menu.
3. Choose a closing period or a custom date range, Summary or Detailed, then download.

More on the help site: Your Commission | Commission Info · My Commissions Report

PART 6

Working From Your Phone

Pipeline runs in your phone's browser. Everything you can do at a desk you can do here, and for filing paperwork the phone is often faster.

1

Put Pipeline on your home screen

There is no app to download. The icon behaves like one from then on.

1. iPhone or iPad: open Safari, go to app.paperlesspipeline.com, tap Share (the square with the arrow), tap [Add to Home Screen], then [Add].
2. Android: open Chrome, go to app.paperlesspipeline.com, tap the menu, then [Add to Home screen], then confirm.

2

File from the road

Forwarding a document to Pipeline takes the same taps as forwarding anything else.

1. Forward the email with the attachment to your Pipeline Maildrop contact. Use the transaction's own address if you know the deal, your Unassigned address if you do not.

3

Check your browser is supported

Blank areas where buttons should be, or a page that never finishes loading, is nearly always a browser that has fallen behind.

1. Update to the latest version of your browser, then sign in again.

More on the help site: Working From Your Phone | Pipeline on Mobile · Maildrop · System Requirements

WHEN YOU ARE STUCK

Where to Get Help

Two people can help, and it is worth knowing which is which.

Your office's admin and support contact answers how things are done in your office: which checklist, which name for a document, who reviews what. Their name is on your Home page.

Our team answers how Pipeline works. Click [Help] in the top-right corner of any page, then [Get Help], and your account details come with the message. Or email help@paperlesspipeline.com. A real person reads it. We are here Monday through Friday, 8am to 5pm Central, and messages after hours are answered the next business day.

The help site is where you look something up on your own. Start at I am an Agent.