Understanding Your Paperless Pipeline Account

Paperless Pipeline gives your office the control and flexibility to manage transactions efficiently, from setup to oversight. As an admin, your role is key to shaping a system that fits your team's workflow and ensures compliance across the board.

Introduction

As an account admin, you're not just using Paperless Pipeline—you're tailoring it to fit how your team works.

From setting up users and checklists to managing permissions and billing, your Pipeline account is the backbone of your transaction management system. The goal: keep your agents productive, your documents compliant, and your office running smoothly.

Video ▯

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Benefits

Here's how managing your company's Paperless Pipeline account empowers your team:

- **Customized Workflows**: Tailor checklists, transaction types, and document approval rules to match your compliance needs.
- **User & Role Control**: Decide who sees what and what they can do, with flexible permissions for agents, admins, brokers, and more.
- **Central Oversight**: Monitor progress across all locations, transactions, and team members at a glance.
- **Simplified Billing**: Choose a transaction-based plan, track usage, and download invoices right from your admin dashboard.
- **Scalable Setup**: Whether you're managing one office or many, you can build a structure that scales with your team's growth.

How It Works

Access Admin Tools

Use your secure login to access the admin dashboard. This is where you'll manage users, settings, billing, and workflows.

Manage Your Pipeline Account

Locations & Roles: Set up office locations, define user roles, and control visibility across your organization.

Users: Add or deactivate users, reset passwords, and assign permissions by role or individual need.

Transaction Types: Create transaction categories that match your business model and reporting needs.

Checklist Templates: Build standardized checklists for each transaction type to keep agents on track.

Approval Workflows: Set up rules so that documents can be marked for admin or broker review before they're considered complete.

Billing & Usage

Monthly Plan: Set a transaction limit that fits your office's pace. No contracts or per-user fees.

Usage Tracking: Monitor how many transactions you've used, and adjust your plan anytime.

Invoices: Access billing history and download past invoices when needed.

Company-Wide Oversight

Activity Logs: See who did what, when—every upload, comment, or checklist update is recorded.

Reporting Tools: Export reports to track deal volume, checklist completion, or agent activity.

Enterprise Access: For large brokerages, the Enterprise Portal connects multiple offices under one login for unified reporting and oversight.

Set Up Your Paperless Pipeline Account

Try Pipeline eSign for free and see how easy it is to send secure, legally binding signatures in Paperless Pipeline. Then, when you're ready, activate your plan to enable signature requests for your whole team.

Learn how to Set Up Your Paperless Pipeline Account

Use Your Paperless Pipeline Account

Send, track, and manage signature requests with ease. Pipeline eSign supports every stage of your team's signing workflow with a flexible plan, reusable form templates, and built-in tools.

Learn how to Use Your Paperless Pipeline Account