Get a New Office Up and Running on Pipeline

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A brand-new brokerage, a new admin, or an account you just inherited — here's the order to do things in, and the help that comes with your subscription.

Introduction

Setting up a transaction management system for a whole office is a real project, and most people walk into it having never seen Pipeline before. The good news is that the path is short. Two training videos, a call with our team, and a handful of settings you make once will carry an office from an empty account to agents uploading documents.

The training and the setup call are both included in what you pay. There's no onboarding fee and no consultant to hire. You watch the videos on your own time, then we sit with you on a screen share and go through your actual account together.

The steps below run in the order we'd walk them with you. Work top to bottom and each one makes the next easier: how documents get named shapes your checklists, your locations decide who your users belong to, and permissions only make sense once the people are in.

When to Use This

- Your brokerage just signed up and you're the admin who has to make it work.
- You bought or took over a company that's already on Pipeline, and nobody handed you a manual.
- You inherited the account when the last admin left, or you're coming back to Pipeline after a few years away.
- Your trial is running out and setup isn't finished.
- The account got set up in a hurry, it isn't working the way your office actually runs, and you want someone to look at it with you.

Why This Beats Booking a Call First

The instinct is to skip straight to a live call, because a person walking you through it feels faster than sitting through video. In practice it's the slower route. An hour of screen share spent covering what the videos already cover is an hour you don't spend on the parts that are specific to your office, and you leave the call having heard everything once, with nothing to go back to.

Watch the two videos first and the call changes character completely. You arrive knowing the vocabulary and holding real questions about your own workflow, so we spend the whole hour inside your account instead of explaining the basics. The videos also stay available afterward, which is what you'll want three weeks later when you're setting up the thing you weren't ready to think about yet.

1. Watch the Admin Training Series

Start here. The Admin Training Series is two on-demand videos, free with your account and available whenever you have time for them.

- **Setting Up Paperless Pipeline** covers the admin settings: your company info, document names and labels, locations, users, permissions, and checklist templates.
- **Using Paperless Pipeline** covers the daily work: creating transactions, uploading and routing documents, running checklists, and the reports you'll live in.

They're dense, and they're the fastest way to get a new admin fluent. Ask us for the links, or find them in the Help & Video Learning Center from inside Pipeline.

> Not a video person? Both videos are on YouTube with full transcripts and chapter navigation, so you can read them instead or jump straight to the section you need.

2. Book Your Account Setup Call

Once you've watched the videos, get a real person into your account with you. The Account Setup Call is a complimentary one-on-one screen share with our support team, where we open your account and go through it together: your settings, your document names, your checklists, and whatever your office does that doesn't look like anybody else's office.

Your master admin books it, and any admins you'd like can join the same session. Ask us for a time and we'll get it on the calendar.

> **Already up and running?** The same call exists for established accounts as an **Account Tune-up** — an hour to review how your account is set up now, tidy your checklists, and make sure you're getting everything you're paying for.

> **Running commissions in Pipeline?** The Commission Module has its own complimentary one-hour setup call, separate from this one. It's offered when you start the module's free trial, and your master admin needs to be on it, because only the master admin can complete the initial setup.

3. Fill In Your Company Details

Set the company name and brokerage license number that identify your account throughout Pipeline.

See Company Name & License

4. Standardize How Documents Get Named and Labeled

Do this before your agents upload anything. Every office that skips it spends the next year with four spellings of the same disclosure, and cleaning that up later is far more work than deciding it now.

Build a shared list of your company's document names, and every agent names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

Labels are the second half of it, and they're what makes a long document list readable at a glance.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See Doc Labels

5. Set Up Your Locations, Then Add Your People

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location

Then bring your people in.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

> Adding a whole roster one at a time isn't the only option, and for a big office it isn't the fast one. Send us your agent list on a spreadsheet and we'll load it for you at no charge.
>
> Sixty agents, one spreadsheet. Send us the list and your whole roster lands in the account — quietly, on your schedule, with nobody hearing from Pipeline until you say so.
>
> See Bulk-Onboard a Roster of Agents

6. Decide What Each Person Can See and Do

An agent should see their own deals. A transaction coordinator usually needs to see everyone's. Your bookkeeper may need commissions and nothing else. Permissions are how you draw those lines, and they're set per person, per location.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

7. Build the Checklists Your Office Runs On

Checklists are where Pipeline stops being storage and starts being process. Build a template for each kind of deal you handle, and every transaction of that kind starts with your requirements already on it.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

Then stop applying them by hand. Auto-apply rules put the right checklist on a transaction the moment it qualifies, which is the difference between a system your team follows and one they forget.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules

> Checklists are the most common thing admins bring to the setup call, and the best use of that hour. Come with a rough list of what your office requires on a file and we'll build the template with you.

8. Hand Your Agents Their Training

We train admins on the system, then give you resources to train your agents on your own process. That split is deliberate: every office runs differently, and what your agents need to know is mostly your workflow, not ours.

To cover the product side, point your agents at these:

1. The **Agent Training Manual**, a downloadable guide they can keep.
2. The **Agent Quick Start Video**, short enough that they'll actually watch it.
3. The **Agent Learning Center**, for the agent who'd rather look something up on their own.

Then cover your process on top of it. Our Pipeline Pro webinar recordings **How to Train Your Agents** and **Building a Custom Training Library for Agents** are worth an hour before you write anything of your own, and support can send you the links.