Training & Onboarding FAQ

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We train admins on the product and give you the material to train your agents on your own process. Answers to the common questions about who trains whom, where the videos are, session recordings, and what we set up for you.

Was the session recorded, and how do I get the replay?

Yes. Every session is recorded, and the replay goes to everyone who registered, whether or not they made it.It arrives by email once it's ready. That's rarely the same day, and it has taken up to about a week. Registering is what puts you on the list, so register even when you already know you can't be there.

I'm brand new to Pipeline. Who's going to train me?

Your office admin for how your office works, and us for how Pipeline works. Start with the material for your role — the Admin Training Series if you run the account, the Agent Quick Start Video and Agent Training Manual if you don't. Your admin's name and contact are on your Home page under **Admin & Support**.

Where do I find the training videos?

In the Help & Video Learning Center inside Pipeline.It holds the video lessons alongside the how-to articles. If you can't find the one you're after, email **help@paperlesspipeline.com** and we'll send the link directly.

Do you train our agents for us?

No — we train admins, and publish agent material for you to hand out. What an agent needs to know is mostly your office's workflow rather than ours, and offices differ enough that a general class would miss most of it. The Agent Training Manual, the Agent Quick Start Video and the Agent Learning Center cover the product side. Our Pipeline Pro recordings on training agents and on building a custom training library cover how to build the rest.

I registered for a session but the email doesn't have a link to join.

The join link is sent when you register, not in the reminder that follows. Look back for the confirmation you got at registration, and check the hour while you're there — session times are announced in Central Time. Email **help@paperlesspipeline.com** and we'll send the link straight to you.

Can someone set our account up for us?

We set it up with you rather than for you, on a screen share. Your document names, your locations, your permissions and your checklists are all decisions about how your office works, and they vary too much between brokerages to configure from the outside. Book a session and we make those decisions with you, in your account, in one sitting.

Are the training videos available in other languages?

They're in English, and no other versions are planned. The videos are hosted on YouTube, so you can turn on auto-translated subtitles in the player: click **CC**, then **Settings**, then **Subtitles/CC**, then **Auto-translate**, and pick your language.

Features have been added since I started. How do I catch up?

The Admin Training Series covers setup and daily use, and the What's New release notes list what's landed since. For a look at your own account rather than the product in general, book a session with us. A review of how you have things set up now is the quickest way to find the parts you aren't using yet.

Learn More

Get up to speed on Pipeline with videos you can watch today and a screen share you book with our team. Which one you need depends on whether you're setting the account up or working inside it.

See Training & Onboarding