Training & Onboarding

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Pick your path. Everything an admin needs to learn Pipeline and to train their agents, and everything an agent needs, on one page.

Introduction

You've opened a new Pipeline account, taken over the admin work on one, or joined an office that already runs its deals in Pipeline. Or you've used it for years and want to see what you're missing.

Our team teaches how Pipeline works, and the admin in your office, who may be you, teaches how your office uses it, since every brokerage runs its transactions its own way. Admins get a two-part video series, one on setting up the account and one on the daily work, and a screen-share session where we set up your checklists, locations and permissions with you. Agents get a short path through the Help Center, a Quick Start guide to keep, and the name of the person in their office to ask first.

For Admins

In this order. Most of it you work through on your own; the session you book with us.

1. Follow the Admin Path

The admin's way through Pipeline in the Help Center: the account first, then your offices, then one deal from open to close and the pages you run it from. Each page hands off to the article that goes deeper.

See I am an Admin

2. Watch the Admin Training Series

Two sessions, in order. Part 1 sets the account up: locations, users, permissions, document names and labels, checklist templates. Part 2 is the daily work once it is: transactions, uploading and routing documents, checklists, and reports.

Part 1: Set Up Paperless Pipeline

Part 2: Use Paperless Pipeline

3. Book a Session With Us

Get a member of our team into your account with you, with the right person on the call and the right material in front of you. Live help is booked ahead rather than taken on demand, and the session goes further once you've watched the videos, because it's spent on your own workflow instead of on vocabulary.

Who Can Do This: Anyone can ask. Account setup and Commission Module setup sessions are booked by the master admin, who holds the settings we configure on the call.

To book a session with our team:

1. Email **help@paperlesspipeline.com**, or click [Help] then [Get Help] inside Pipeline, and say what you want to cover.
2. We confirm which session fits and send you the scheduling link. For a new account, you can go straight to the account setup calendar and pick a time.
3. Pick a time that suits you. Sessions run about an hour, and any admins you'd like can join the same one.
4. Bring a digital copy of anything you want us to build with you. The checklists your office requires on a file are the most common, and a spreadsheet or document is easier to work from than paper.

We open your account on a screen share and work through it together, so what you leave with is set up rather than described. Most of what comes up between sessions is a single question, and a single question gets an answer faster in writing: click [Help] then [Get Help], and a real person on our team reads it. See Get Help

4. Setting Up a Brand-New Office?

Taking an empty account to agents uploading documents is a bigger job than learning the screens, and the order you work in decides how much of it you redo later.

Get a brand-new brokerage, a new admin, or an account you just inherited set up in the right order, with the help that comes with your subscription.

See Get a New Office Up and Running on Pipeline

5. Train Your Agents

We train admins, and give you the material to train your agents. What an agent needs to know is mostly your office's workflow rather than ours, so the product side is covered for you and the process side is yours. Three things to hand them:

- **The Agent Quick Start.** A PDF, not a video: six parts that follow the I am an Agent path exactly, and every move says where to click, so it reads on its own. Download it, then attach it to the welcome email, print it, or post it on your Reference page.
- **The agent path in the Help Center.** The same six parts, with a link from every move to the article that goes deeper. See I am an Agent
- **Your name.** Agents ask about process constantly, and the answer lives in your office. Name the person your agents ask first, and their details sit on every agent's Home page under Admin & Support. See Admin & Support Contact

6. Go Further

Pro Guides are the moves experienced Pipeline users rely on every day, from saved searches and keyboard shortcuts to sending email without leaving the transaction.

See Pro Guides

For Agents

Two things to read and one person to know. That's the whole path.

1. Follow the Agent Path

The short way through Pipeline for an agent: signing in, getting documents in, your transactions, your tasks, your commission, and working from your phone. Six pages, each handing off to the article that goes deeper when you want it.

See I am an Agent

2. Keep the Quick Start

The same six parts as the path, as a PDF you can keep. Every move says where to click, so it reads without the Help Center.

Download the Agent Quick Start (PDF)

3. Know Who to Ask

Two people can help, and it's 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 under Admin & Support. 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.

See Get Help

Frequently Asked Questions

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 path for your role in the Help Center: I am an Admin if you run the account or an office, I am an Agent if you don't. Then watch the videos on this page, and hand your agents the Agent Quick Start. Your admin's name and contact are on your Home page under **Admin & Support**.

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 I am an Agent path in the Help Center and the Agent Quick Start guide, a PDF you hand out, cover the product side.

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.