Training & Onboarding

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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.

Introduction

You're new to Pipeline, or newly responsible for it. Maybe you've just taken over the admin seat, maybe you joined an office that already runs on it, maybe you've used it for years and know you're working with half of what's there.

Help comes in two forms. There's material you watch on your own time, written separately for admins and for agents. And there's live time with our team on a screen share, booked ahead, where we open your actual account and work through it with you.

One line runs through both — we teach the product, and your office admin teaches your office's process. Every brokerage runs transactions its own way, and the part that's specific to yours is the part your admin knows.

How It Works

Most of it you work through on your own; the last part you book with us.

Who Teaches You What

We train admins on how Pipeline works, then give you the material to train your agents on how your office works. The split is deliberate: every company runs transactions differently, so *how do we do it here* is a question your own admin answers faster than we can. Their name and contact sit on your Home page under **Admin & Support**.

What You Can Watch Today

The material is on demand and sorted by who's using Pipeline. It lives in the Help & Video Learning Center inside Pipeline, and support can send you direct links to any of it.

Who it's for	What it is	What it covers
Admins	Admin Training Series, in two parts	Part 1 sets the account up: locations, users, permissions, document names and labels, checklist templates. Part 2 is the daily work: transactions, uploading and routing documents, checklists, and reports.
Agents	Agent Quick Start Video	A few minutes on the basics — adding a transaction, uploading documents, assigning them, and working a file that already exists.
Agents	Agent Training Manual	A downloadable guide an agent can keep and refer back to.
Agents	Agent Learning Center	Where an agent looks something up on their own instead of asking.
Admins	Pipeline Pro webinar recordings	Past sessions on one subject at a time, including how to train your agents and how to build a custom training library for them.

Getting Time With Our Team

Live help is booked ahead rather than taken on demand. Tell us in writing what you want to cover and we put you with the right person, then get a screen share on the calendar. The session goes further once you've watched the videos, because it's spent on your own workflow instead of on vocabulary.

Book a Session With Our Team

> 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.

> **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.

3. Pick a time that suits you. Sessions run from about 20 minutes to 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.

Set 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.

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.

See Get a New Office Up and Running on Pipeline

Ask a Question Between Sessions

Most of what comes up while you're learning is a single question, and a single question gets an answer faster in writing than on a calendar.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help

Name the Person Your Agents Ask First

Agents ask about process constantly, and the answer usually lives in your office rather than with us. Naming that person puts their details in front of every agent who logs in.

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact

Training & Onboarding FAQ

Answers to the common questions about who trains whom, where the videos are, session recordings, and what we set up for you.

See Training & Onboarding FAQ.