

Paperless Pipeline Instructions.

1. Log in to PaperlessPipeline.com, your log in ID is your email address, your temporary passcode is: tpr123 unless you've changed it already. If you can't log in try the "Forgot Password" function if that doesn't work send us an email and we will work with you to get you to log in.
2. You're now on the Dashboard, click on "Add a Transaction".
3. Your location is your board location, if it is incorrect don't worry about it. Not important.
4. Name the transaction the full property address (house number, street, city). Same as what is on the CDA and the closing statement.

Do not name it the clients name.

5. We don't need the MLS#
6. On the status tab click on "Active".
7. On the label tab click on either "Buyer" or "Listing" if you make a mistake don't worry about it.
8. Skip the dates and go to "Assign Agent". Type in your name and click it when it pops up.
9. All your transaction documents need to be in a PDF format. The system will only read PDF's.
10. Name the PDF what the document is (IABS, 1-4, 3rd Party Financing, etc.). The system will ask you to upload the documents.
11. After you upload the documents, you will need to assign those documents to the proper transaction name that you just created. Then the system will ask you who can view the documents you've uploaded. Under "Permission Category" click on office or private, this will allow you and the office to view the documents you've uploaded.
13. After that, you're done. Thank you, Simple Right?

Docs to Save into Paperless Pipeline

Buyers Agents

Information About Brokerage Services.

Buyers Rep Agreement. If you have one.

Receipted, Executed Contracts, **DO NOT UPLOAD OFFERS!**

Sellers Disclosure signed by the buyer and seller.

Third Party Financing.

All Addendums that are part of the contract signed & Initialed.

Any documents that you have your buyer or seller sign.

A copy of the CDA.

A copy of the Signed Settlement Statement that shows the commission paid out.

If this is Intermediary, we will need a buyer's rep with Intermediary allowed checked.

We will need Intermediary notice signed.

We do not need HOA documents.

We do not need title policies.

Docs to Save into Paperless Pipeline Listings Agents

All listings must have a listing agreement signed with an end date before it is listed.

Information About Brokerage Services

Receipted, Executed Contracts, **Do Not Send Offers!**

Sellers Disclosure signed by the Seller & the Buyer.

Third Party Financing.

All Addendums that are part of the contract. Signed and Initialed.

Any documents that you have your client sign.

A copy of the CDA.

A copy of the Signed Settlement Statement that shows the commission paid out.

If this is Intermediary, we will need a listing agreement with intermediary allowed

We will need Intermediary notice signed filled out correctly.

We do not need HOA documents.

We do not need title policies.