

Create and Upload an Agent Roster

SUMMARY


This article describes how to create and send an agent roster to Paperless Pipeline to be uploaded to your account.

Prepare an Agent Roster

- 1 Create your agent roster in spreadsheet** A roster must include separate columns for the agent's first name, last name, primary email address, and role. Optionally, information such as phone number, license, and office locations may be provided. Not sure where to start?

[Use this template](#) →

- 2 Complete this form**→ and we'll upload your roster.

 Don't worry about your agents receiving a welcome email from Pipeline before you're ready to send it. You control when the welcome email goes out. [Learn more about welcoming agents to Pipeline](#) →

 Send an email to success@paperlesspipeline.com if you need assistance.