Paperless Pipeline Admin Training Series

Learn how to set up and use your Paperless Pipeline account to best support your team.

Each admin on your team should watch BOTH videos to gain an understanding of how Pipeline works and how to use it.

Introduction

Our 2-part Admin Training Series is designed to help your team hit the ground running in Paperless Pipeline. **Each admin on your team should watch BOTH videos to gain an understanding of how Pipeline works and how to use it.**

In the Part 1 video, we'll go over how to customize your Pipeline account to meet the needs of your business, including adding locations and groups, creating custom checklists, and customizing different elements of your team's workflow.

In the Part 2 video, we'll dig into Pipeline's tools and features to help you manage your transactions most efficiently. This includes adding and managing transactions and checklists, uploading and reviewing documents, and communicating with team members and clients.

Your training doesn't end there, though. We want to help you get the most out of Pipeline, so if you have any questions now or in the future, our friendly, knowledgeable team is always here to help.

Part 1: Set Up Paperless Pipeline

Learn how to set up your Paperless Pipeline account to be specific to your company's workflow and needs to ensure Pipeline will be successful for you and your team.

15:22

Part 2: Use Paperless Pipeline

Learn how Pipeline can help you best support your team.

7:37

Still Have Questions?

If you have any questions after watching the Admin Training Series, we encourage you to schedule a one-on-one call with us. We can take the time to answer your questions and give you the personalized attention you deserve. Additionally, we can provide you with explanations and demonstrations tailored to your specific needs, so you know you're getting the most out of Pipeline from the start. Click to schedule a convenient time →