Company Settings

Explore the various company-wide options available for your Paperless Pipeline account that can benefit your entire team.

Who Can Do This? Master admins

Global Settings

Company Name

Your company name.

Brokerage License

Your brokerage's license number.

Document Settings

Only Allow PDF Documents

Require users to upload all their documents in PDF format.

You can restrict document uploads to PDF docs. PDFs can be rotated, merged, and broken apart right inside Pipeline, saving your agents and admins lots of time. If you allow all document types, non-PDF documents will have these functions disabled.

To maximize your agents' and admins' efficiency with Paperless Pipeline, we recommend enabling this feature.

Prevent Duplicate Document Uploads

Allow the system to check agents' uploaded documents for duplicates and only allow each file to be uploaded once. Admins will still be able to upload duplicate docs.

When this feature is turned on, Pipeline prevents your agents' from uploading duplicate documents into the same transaction or the same unassigned document location.

Admins can still upload duplicate docs.

When checking for duplicates, Pipeline compares the content of docs (vs just the doc names). So adding docs with identical content to an existing doc will be disallowed if this option is checked.

Include Key Dates on Coversheet

Include a section of tasks marked as key dates on coversheets. All key dates on a transaction (regardless of their visibility) will appear on a transaction's coversheets if checked.

Tasks designated as *Key Dates* can be automatically displayed on transaction coversheets in the Transaction Key Dates and Milestones section.

Learn more about Key Dates →

Email Settings

Email Agents Expiring & Closing Transaction Reminders

Automatically email your agents 5 days in advance of a listing expiration or closing.

Email Agents When Admin Comments on Docs

Automatically email agents whenever an admin comments on documents visible to them.

Email Monthly Production Summary to Agents

Automatically email each agent their prior month's and year-to-date production figures such as sales volume and commissions.

Agents can opt out of receiving the reports by unchecking "Receive monthly production summary by email" on their Personal Profile page.

Learn more about the Monthly Production Summary →

Email Admins Agent Anniversary Reminders

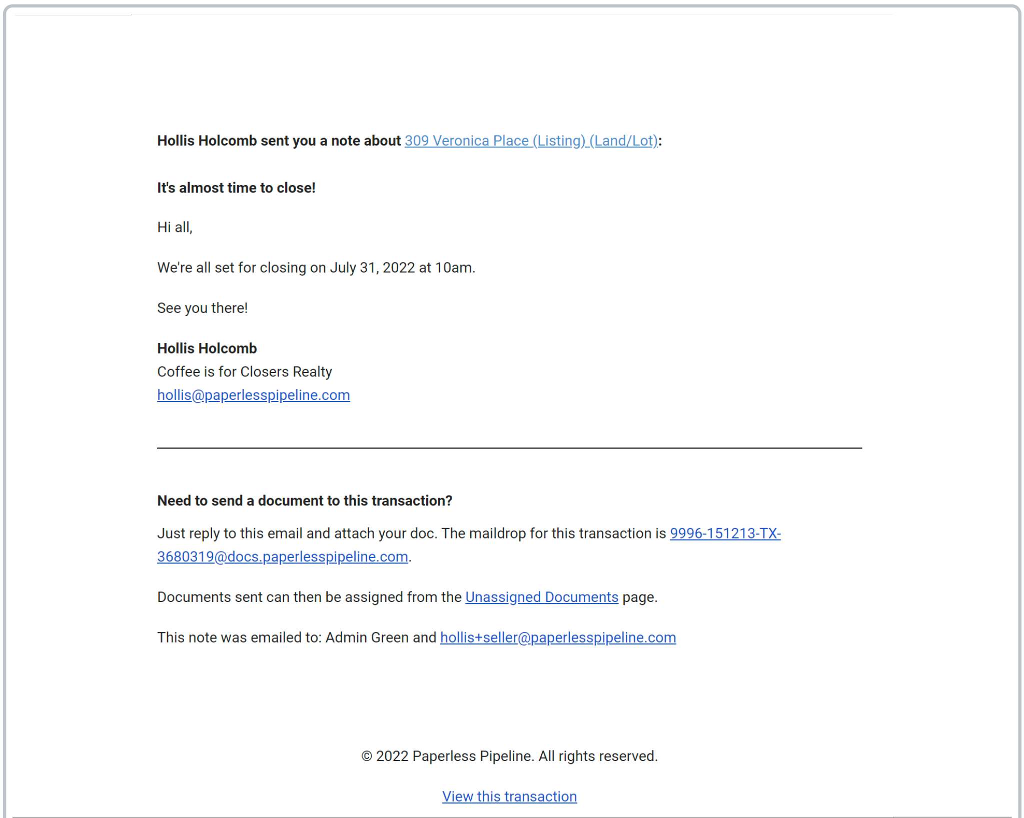
Automatically email master admins and location admins (who have "Manage Users" permission) 5 days before each user's Start Date anniversary. Turn this on if agents' commission splits change on their anniversary and you'd like admins to be reminded to update their commission information.

Use Minimal Formatting for Emails Sent from Transactions

You may set your account to use minimal formatting for messages sent from transactions.

When this option is checked, emails sent from transactions will be minimally-styled.Learn more about Emailing Docs & Notes from Transactions →

Minimally-styled emails



Hollis Holcomb sent you a note about 309 Veronica Place (Listing) (Land/Lot)**:**

It's almost time to close!

Hi all,

We're all set for closing on July 31, 2022 at 10am.

See you there!

Hollis Holcomb
Coffee is for Closers Realty
hollis@paperlesspipeline.com

Need to send a document to this transaction?

Just reply to this email and attach your doc. The maildrop for this transaction is 9996-151213-TX-3680319@docs.paperlesspipeline.com.

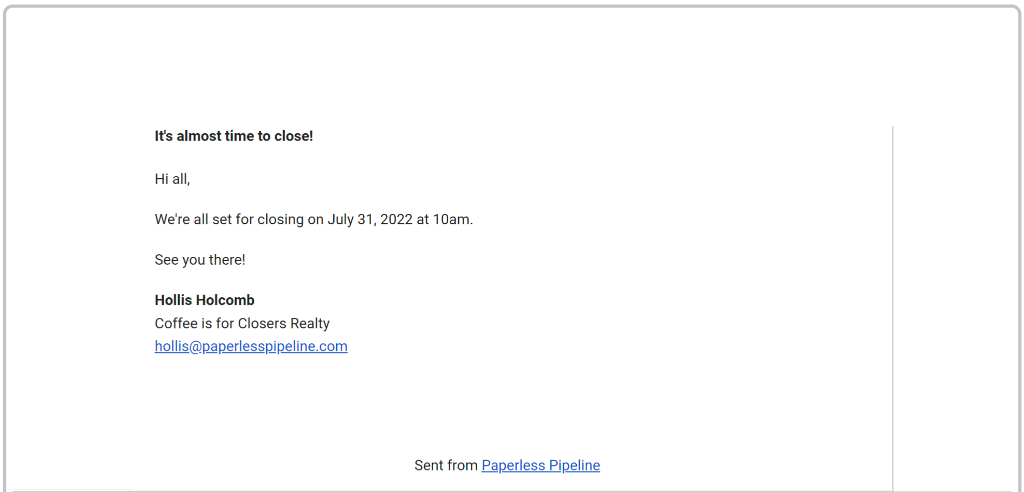
Documents sent can then be assigned from the Unassigned Documents page.

This note was emailed to: Admin Green and hollis+seller@paperlesspipeline.com

© 2022 Paperless Pipeline. All rights reserved.

View this transaction

A minimally-styled email sent to an Internal Recipient



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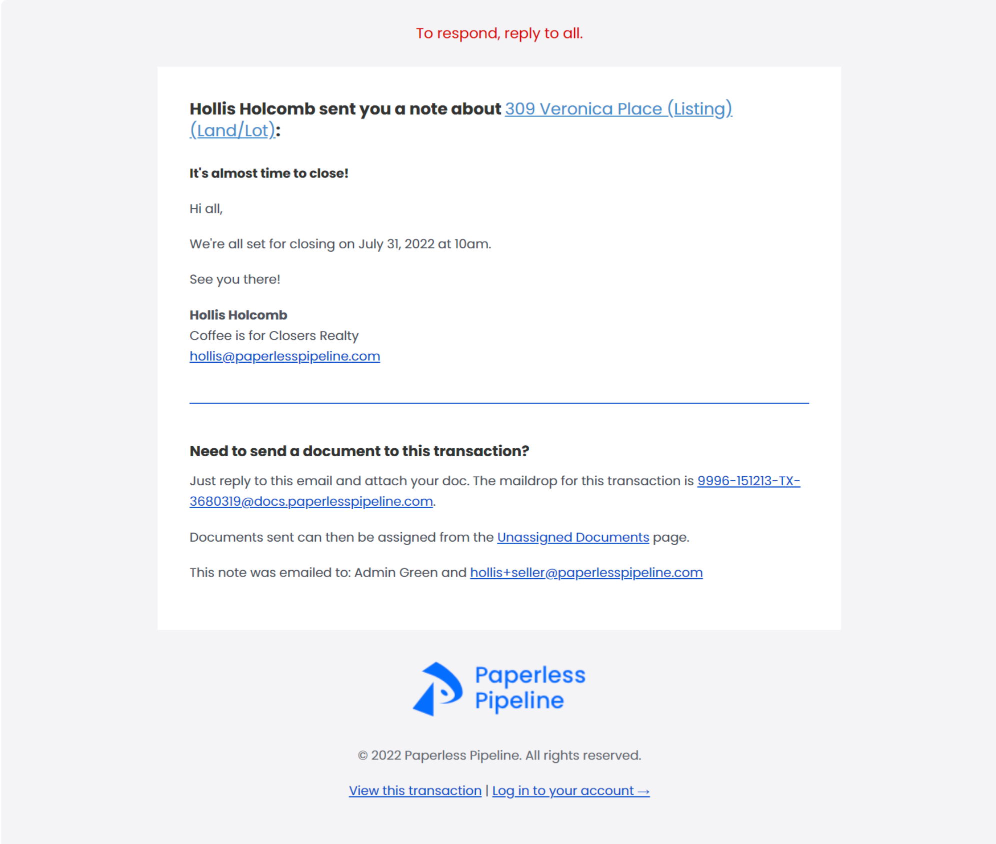
See you there!

Hollis Holcomb
Coffee is for Closers Realty
hollis@paperlesspipeline.com

Sent from Paperless Pipeline

A minimally-styled email sent to an External Recipient

Styled emails



To respond, reply to all.

Hollis Holcomb sent you a note about 309 Veronica Place (Listing) (Land/Lot)**:**

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Paperless Pipeline

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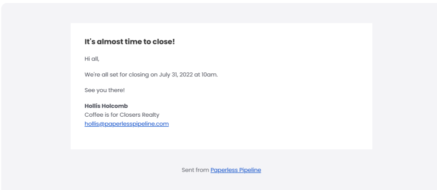
View this transaction | Log in to your account →

A styled email sent to an Internal Recipient



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hollis@paperlesspipeline.com

Sent from Paperless Pipeline

A styled email sent to an External Recipient

Feature Settings

Require two-factor authentication

Enables stronger security for your company's account. When logging in on an unrecognized device, users will be emailed a link to complete the login process.

Learn more about Two-Factor Authentication →

Enable Reviewed Docs Functionality

Allow docs to be marked as reviewed for compliance purposes. (Final review typically performed by managing broker)

Learn how to Review Documents →

Enable Entered Docs

Keep track of which documents have been entered into your accounting system (e.g. Quickbooks, Lonewolf).

The "Entered Docs" feature allows admins to keep track of documents that have been entered into an accounting system or any other external system that's part of your transaction management workflow.

If you enable the Entered Docs feature, an [Entered] checkbox will be shown on transaction documents. You can then mark documents as [Entered] after you have added them into your accounting system such as Quickbooks or Lonewolf.

Learn more about Entered Docs →

Enable New Offer

Enable the ability to duplicate existing transactions through the "New Offer" option of a transaction.

Learn more about New Offers →

Checklist Settings

Show Checklist Completion Percentages to Agents

If checked, agents will be shown the checklist completion percentages of their transactions. If unchecked, only admins will see those completion percentages.

Hide Completed Tasks in Transaction Checklists

Check this box if you want to hide completed tasks from all transaction checklists. When completed tasks are hidden, you still have the option to unhide them by clicking the "Show completed tasks →" text at the bottom of any checklist with completed tasks.

Show Checklists from All Locations in the Add Checklists Dropdown Menu

If unchecked, only checklist templates from the location of the transaction being viewed will be available to be added to that transaction.

Financial Settings

Use Start Dates of Agents to Determine Fiscal Years for Year-to-date Calculations

Check this box if you want the system to use your agents' start dates in YTD calculations. If an agent does not have a start date defined, the calendar year will be used in that agent's YTD calculations.

Uncheck this box to use calendar years in YTD calculations.

Use Agent's Commission Split to Calculate Sales Volume

Check this box if, during CDA generation, you want the system to automatically allocate Sales Volume based on the agent's split of commission when there are multiple agents on a transaction.

Display Pending Transaction Totals in the Year-to-Date Commission Threshold Section

Check this box if, during CDA generation, you want the system to display your agents' Pending Transaction totals in the YTD Commission Split Threshold section.

If unchecked, only Closed Transaction totals will be displayed.

Broker Name for Commission Disbursement

Customize the Broker payable name listed on the Commission Disbursement Authorization. If your brokerage's share of the commission should be made payable to name other than "(your company name)", enter the Broker Name here. Leave blank to use "(your company name)".

Transaction Settings

Enable Auto-expiration of Listings

Check this if you need the system to automatically expire transactions in the Listed status if they haven't been changed to Pending or another status by their expiration date. When the system automatically expires such transactions it will change their status to the Expired/Withdrawn status and will remove the expiration date.

Require Transaction Label

Check this if you want the system to require a label on every transaction. This setting will only be enforced if you have pre-defined at least one transaction label.

Leave this box unchecked if you want transaction labels to be optional.

Allow Agents to Change Transaction Status to Closed, Terminated, and Expired

Uncheck this box if you only want office admins to close and terminate transactions.

When this box is **not checked**, agents with the permission to change transaction status will not be able to change transactions to closed, terminated or expired.

When this box is **checked**, agents with the permission to change transaction status will be able to change transactions to all statuses including closed, terminated, and expired.

Only Include Completed Transactions in Monthly Backups

Check this box to include only Closed, Fell Through, and Expired transactions in your company's monthly backups.

Transaction Name Instructions

Add transaction naming instructions to be shown to your agents and admins when they are creating or editing a transaction.

Leave empty to use the system's default instructions.

Pre-filled Default Value for "More Info" Field of Transaction

Specify default information you'd like to be added to the *More Info* field of all new transactions. Optionally include placeholders to prompt admins and agents to add specific information. For example:

Lock box - _______
Owner agent? - Y/N
Home warranty? - Y/N

Pre-filled Default Value for "Admin Info" Field

Specify default information you'd like to be added to the *Admin Info* field of all new transactions. Optionally include placeholders to prompt admins to add specific information. For example:

Flagged for Special Review - YES/NO
TC Requested - YES/NO

TC Name - ___________

Pre-filled Default Value for "Commission Summary" Field

Specify default information you'd like to be added to the *Commission Summary* field of all new transactions. Optionally include placeholders to prompt admins and agents to add specific information. For example:

Commission Percent -
Agent Commission -
Broker Commission -
Referral Fee -

Optional Fields

Optional Transaction Date Fields / Checklist Trigger Dates

Check any *Optional Transaction Date Field* to activate it on all transactions. When activated, *Optional Transaction Dates* will also become a *Relative Trigger Date* for *Task Due Dates* and *Scheduled Messages.*

- Inspection Due Date
- Inspection Date
- Loan Approval Due Date
- Loan Approval Date
- Appraisal Due Date
- Appraisal Date
- Earnest Money Due
- Earnest Money Deposit
- Option Period End Date

Learn more about Optional Fields →

Other Optional Fields

Check any *Other Optional Field* to activate it on all transactions.

- Earnest Money Amount
- Lockbox Code
- Home Warranty
- Year Built
- Financing Type

Learn more about Optional Fields →

Welcome Message Settings

New User Welcome Email Subject

Enter a subject line for the welcome email sent to new users added to your organization. If left blank, a default subject line will be used.

New User Welcome Email Message

Enter a message for the welcome email sent to new users added to your organization. The user's sign-in information will be automatically inserted below your message. If left blank, a default message will be used.

Admin & Tech Support

Support Name

Name of the support staff shown on your users' Dashboard. Leave empty to default to the master admin's name.

Support Email

Email address of the support staff shown on your users' Dashboard. Leave empty to default to the master admin's email address.

Support Phone

Phone number of the support staff shown on your users' Dashboard. Leave empty to remove phone number.

Home Page Announcement

Post an announcement to appear on the Home page for all users in your account when they login. Users may hide an announcement once they've seen it.

Remove the announcement from this field once you'd like it to be removed from the Home page. Newly added/updated announcements will be shown (unhidden) for all users, even if they have hidden a previous announcement.

You can use markdown to add bold text, italic text, and links.

Company Logo

Upload a *Company Logo*. Your logo must be a .jpg or .png file. Your image will automatically resize to fit 195px wide by 85px tall.

Your *Company Logo* will be displayed on the Home page and transaction coversheets. For offices subscribed to the Commission Module, it will also show on Commission Disbursement Authorizations and commission statements.