

Account Setup Call

SUMMARY

Schedule a one-on-one account setup call with your dedicated Account Manager. We'll review your account and assist you with basic setup to ensure you are getting the most from your Paperless Pipeline account.

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WHEN: [Click to schedule a convenient time →](#)

WHERE: Account setup calls are hosted on Zoom meetings to allow for screensharing. You'll receive an invite to join a Zoom meeting before your scheduled call.

HOW LONG: Varies (20 minutes - 1 hour)

WHAT TO BRING: Bring a copy of any checklists you want to add to Paperless Pipeline, preferably in digital format (e.g. Google doc, Word document, or spreadsheet).