Paperless Pipeline© Instructions:

Log in at: https://app.paperlesspipeline.com

Or, simply go to www.ROTB-ResourceCenter.com
and click on the RE/MAX Documents button!

Enter ID: (Your RE/MAX.net email address)

Password: rmXXXX (rm + your personal code)

Dashboard:

Summary of Activity, Transactions, Etc. – this is your "Home Page"

+ Add Transaction: **Î Upload Document:**

Adding a transaction:

+ Add Transaction:

Location:	RE/MAX on the Brazos (default)
Name:	Address of property (ex: 123 Main St)
MLS ID or Transaction ID:	MLS #
Status:	Enter correct status of this transaction
Close Date:	Enter estimated close date by using calendar at the side

Who can see this transaction? Select the appropriate listing agent(s) and selling agent(s)
Note: Sue and I can see all transactions; you *do not* have to select either of us, ever.

This transaction has outside (co-op) agents: Select this box if applicable & then enter agent's name

Optional Information (hide) (Please enter this data)

Auto expiry date:	enter the listing expiration date – unless the status is changed to closed or pending, this transaction will automatically change to expired on the expiration date
Buyer Name:	Enter the buyers' names
Seller Name:	Enter the sellers' names

Add Transaction cancel Choose the appropriate button

Uploading a document:

Î Upload Document:

Location: RE/MAX on the Brazos (default)

Select a File — Click to open browser & locate file to be uploaded

Once the file is uploaded, it will appear on your Dashboard, waiting to be assigned to a transaction.

Docs to assign (view all →)

Find the document and click **Assign**

Assign the document to the appropriate transaction

Assign Document:

Document Category: Select appropriate category

Listing Contracts	(only listing agents can view)
Sales Contracts	(both listing & selling agents can view)
Miscellaneous Documents	(both listing & selling agents can view)

Name: name the document (ex: Listing Agreement, Sales Contract, Amendment, etc.)

Status of Document: Select appropriate status

Working	(ex: an offer, lease application, etc.)
Incomplete	(ex: waiting for signatures from one party)
Complete	(fully executed – this will be most documents uploaded)
Deal Fell Through	(ex: Buyer terminated)

Transactions:

Select "Transactions" in the menu bar to see a list of all your transactions.

You can sort and/or search your transactions by Status, Office, or Document Type by using the drop down selection boxes – then click FILTER or you can Show all

You can also sort by transaction **NAME**, ascending or descending (keep in mind, your transaction name will begin with the Street Number)

From this page, on the right side of the screen, you can also: **+ Add Transaction:;** Search by Transaction address, office, MLS, or agent's last name; do an advanced search; you can see **Recently Updated** transactions; and you can download your transactions to an Excel Spreadsheet!

Viewing Transactions:

To view a transaction – Simply click on the transaction's name (address). When the transaction opens, it will look similar to this:

123 Main St, Sugar Land, TX 77479

Last updated 4 minutes ago by Super Agent

MLS ID: 1234567

Maildrop: 4614-1067-MLS-12345678@docs.paperlesspipeline.com

(This is a great way to add documents directly into your transaction – simply attach your .pdf document to an email and send it to this maildrop email address – hit send and it automatically uploads the attached document directly into your transaction!)

Status: Listing

Office: RE/MAX on the Brazos

Agents: Listing Selling

- John Smith - Jane Doe (outside)

Show checklist

Click **Show checklist** to open the office checklist(s) for this transaction – items needed will be unchecked – A CDA will not be prepared until all necessary items have been checked off.

Adding Notes to a transaction:

Documentation is extremely important in any transaction. You can type notes into this section – and if you wish, you can send the note to the listing and/or selling agent (within the office) for transactions.

Add a note about 123 Main St, Sugar Land, TX 77479

Notify people via email:

☐ Listing agents

All notes will be listed here and can only be deleted by the note author (you), or a staff member (Sue and Julius).

Documents in the transaction:

Below the notes, all documents that have been assigned to this transaction will be separated by type. From here, you will be able to preview the document, edit document status, email document to an outside party (title company, lender, other agent, etc.), or rotate the document 90 degrees!

Listing Contracts, Sales Contract, or Miscellaneous Document	Status	Added on	Actions
Name of Document	Status of document	Date added	etc.

Hoover over the name of the document and a preview screen will appear, or click on the document to open it up in full view.

Multiple Offers:

Have a new offer from another agent? Create New Offer »
This will make a new copy of the above transaction to which
you can assign your new offer documents.