

PaperlessPipeline Complete Walkthrough

Moving through a transaction step-by-step

Goal: Demonstrate how to go from a signed listing to closed and stored.

Warning: This PDF will not be 100% clear unless you watch the webinar with it.

Print out and this guide to follow along with the webinar.

This webinar will show 4 peoples perspectives

1. The broker/manager/transaction coordinator
2. Staff - data processors
3. The listing agent
4. The selling agent

This example assumes the Agent creates a transaction. If you want staff to create transactions just replace the "Agent" with a "Staff"

Step 1 - Create The Listing

1. Agent creates listing transaction
2. Agent uploads file directly to transactions
3. Agent adds the maildrop ID as a contact in email account

Step 2 - Broker reviews

1. Broker goes to unreviewed page
2. Broker opens transaction
3. Broker adds listing checklist
4. Broker reviews doc
5. Broker marks off doc as reviewed and complete

Step 3 - Staff enters data into accounting

1. Staff goes to unreviewed page
2. Staff finds "unentered docs"
3. Staff enters doc into accounting
4. Staff marks doc off as entered

Step 4 - Create The Pending

Now assume the Agent gets a new offer & transaction goes to pending

To demonstrate a different way to upload docs:

1. Agent goes to scanner, scans directly into working docs page
2. Agent assigns doc into transaction
3. Broker logs in to review
4. Broker changes transaction status from listing to pending
5. Broker adds pending checklist
6. Broker finds missing signature on doc
7. Broker emails note to Agent from the system
8. Agent replies to emailed note, attaches file, and sends back to the transaction

Step 5 - Fast forward 30 days while in pending

1. Agent gets an updated termite inspection from termite inspector

2. Agent forwards email with file attached directly into transaction

Step 6 - Agent See's Missing File

1. Agent logs in to dashboard page
2. Agent see's all of his "transactions closing in 14 days"
3. Agent see's 1 transaction has incomplete checklist
4. Agent goes to transaction, see's the missing file
5. Agent uploads the missing file
6. Broker logs in to review, and transaction is DONE