

Enterprise Account Management

The Enterprise Portal offers a central location to add and oversee all accounts within an Enterprise.

Introduction

Think of your Enterprise Portal as a control center, providing a streamlined hub where Enterprise Admins can efficiently manage and oversee all accounts within your Enterprise. This central access point saves admins the time of managing and monitoring accounts separately.

From the portal, Enterprise Admins can add new accounts to the Enterprise, access individual accounts to manage details or perform various setup and management tasks, and seamlessly switch back to the portal for an overview of all accounts.

With comprehensive access to your accounts, you can more easily coordinate activities, share resources, and maintain alignment across accounts within your Enterprise.

Access Your Enterprise Portal

Access your Enterprise Portal to oversee all accounts within your Enterprise.

Who Can Do This? [Enterprise Admins](#) .

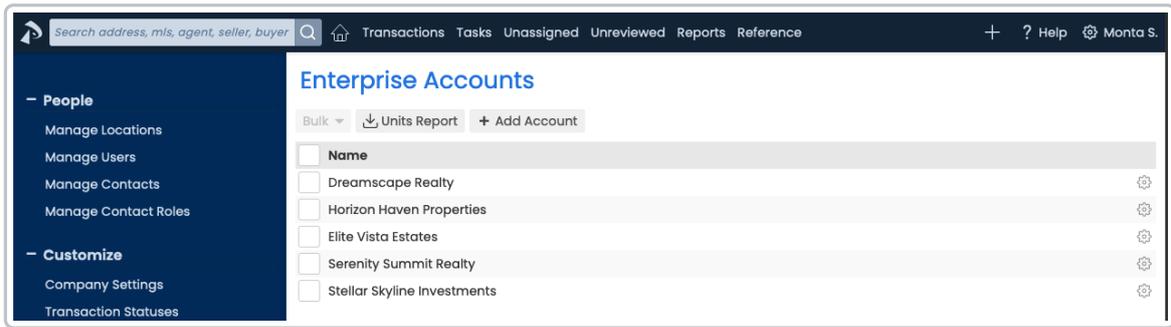
To access accounts in your Enterprise:

Go to Your Enterprise Portal :

- From your Enterprise Admin profile, click your name in the upper right corner, then [Admin / Settings].
- Select [Manage Accounts] from the *Enterprise Portal* section of the left menu.

View Accounts:

- You'll see a list of accounts belonging to your Enterprise.



Add a New Account to Your Enterprise

Add a new Paperless Pipeline account to your Enterprise to expand your business into a separate account.

Who Can Do This? [Enterprise Admins](#) .

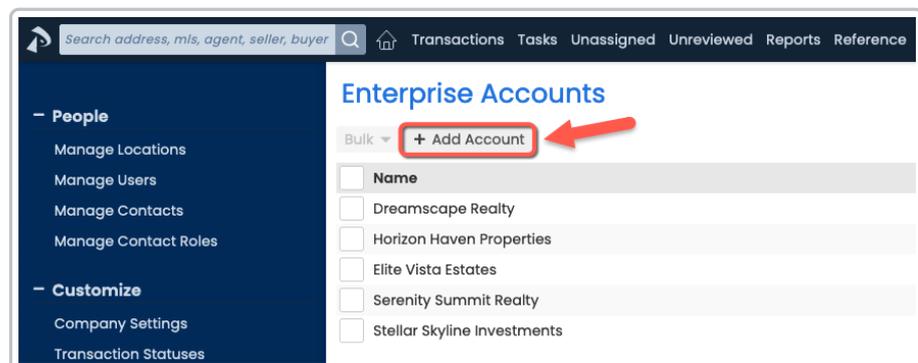
To add a new account:

Go to **Your Enterprise Portal** :

- From your Enterprise Admin profile, click your name in the upper right corner, then [Admin / Settings].
- Select [Manage Accounts] from the *Enterprise Portal* section of the left menu.

Add Account:

- Click [ Add Account].



Complete & Submit Form:

- Fill in the necessary information about the new account, including the name, address, and other relevant details.

- Submit the form.

The new account will appear in your Enterprise Portal where you can:

- Access the account directly (described below).
- Continue setting it up. [Learn how to set up Paperless Pipeline →](#)

Access an Account In Your Enterprise

Access an individual account in your Enterprise to log in and manage details, updates, or perform specific tasks.

Who Can Do This? Enterprise Admins .

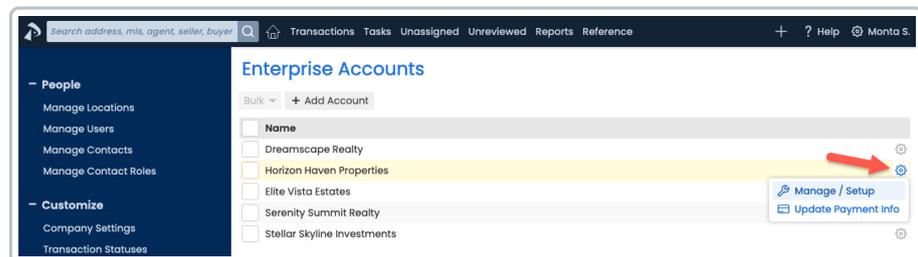
To log into an account within your Enterprise:

Go to **Your Enterprise Portal** :

- From your Enterprise Admin profile, click your name in the upper right corner, then [Admin / Settings].
- Select [Manage Accounts] from the *Enterprise Portal* section of the left menu.

Find & Select Account:

- Find the account you wish to access in the list.
- Click the account's gear, then [Manage / Setup].



Log In:

- Select your *Email* from the list, then enter your *Password*.
- Click [Log In].

Manage / Setup: Horizon Haven Properties

Select which profile to log in to.

Email

- Choose log in email -

horizonhavenstaff@paperlesspipeline.com
horizonhavenadmin@paperlesspipeline.com

Cancel
Log In

You'll be logged into the account, allowing you to manage Admin Settings, access transactions, run reports, and more. [Learn how to use Paperless Pipeline →](#)

Return to the Enterprise Portal

While accessing an account from your Enterprise Portal, return to your Enterprise Portal to switch back to your overview of all accounts.

Who Can Do This? [Enterprise Admins](#) .

To return to the portal from an individual account:

Go to Settings Menu:

- While [accessing an account](#) from your Enterprise Portal:
 - Click your name in the upper right corner.

Return to Portal:

- Click [Return to Your Offices]. You'll be taken back to the portal.

