Enterprise Admins

Enterprise Admins have total authority over all aspects of each account within an Enterprise, including the ability to manage settings, permissions, and billing details.

Introduction

Through the Enterprise Portal, Enterprise Admins have complete control over all aspects of each account within the Enterprise including the ability to manage settings, permissions, and billing details.

For individual accounts, Master Admins maintain control over handling tasks like managing settings, permissions, and reporting. By default, they are restricted from updating payment information, but that ability can be turned on by Enterprise Admins.

By clearly defining admin roles, your Enterprise boosts governance and compliance across accounts, ensuring a smooth workflow across various levels of management within your business.

How It Works

Enterprise Owner

Enterprises can optionally designate an Enterprise Owner. An Enterprise Owner has the same authority as Enterprise Admins, with the additional authority to shut down the Enterprise.

If an Enterprise Owner is designated, the Owner is the only person who has the authority to close the Enterprise.

If no Enterprise Owner is designated, any Enterprise Admins can close the Enterprise.

Enterprise Admin

With the Enterprise Portal as their control center, Enterprise Admins have total authority over all Enterprise accounts. This enables them to monitor activity and manage settings across all accounts.

Enterprise Admins can:

- **Access the Enterprise Portal**: Add and manage accounts, monitor activity, and update billing details.
- **Add Accounts**: Add new accounts to the Enterprise.
- **Manage Accounts**: Access and update individual account details and seamlessly toggle back to the Enterprise Portal for an overview.
- **Grant Permissions**: Appoint fellow Enterprise Admins, designate Master Admins for individual accounts, and grant specific permissions to users.
- **Oversee Billing**: Handle billing matters for all accounts within the Enterprise.
- **Exercise Full Account Control**: Perform all tasks related to adding, closing, and managing accounts across the Enterprise, including all functions Master Admins can perform for an individual account.

Master Admins

Master Admins operate under the authority of Enterprise Admins. Within an Enterprise, Master Admins maintain control over handling tasks like managing settings, permissions, and reporting. By default, they are restricted from updating payment information, but that ability can be turned on by Enterprise Admins. This ensures financial security and accountability while allowing Master Admins to manage other crucial aspects of the account.

Master Admins of accounts within an Enterprise have the same permissions as regular Pipeline Master Admins with the exception of the following:

- They have no access to the Update Credit Card Page .
- They cannot authorize any non-subscription-related charges.

Change Ownership of an Enterprise

Change ownership of an Enterprise.

Who Can Do This: Enterprise Owners.

To change ownership of your Enterprise:

Begin the Process in one of the following ways:

- Log into your Enterprise Admin profile and contact us from within Pipeline.

- Send us an email from the email address associated with your Enterprise Admin profile.

Once you've contacted us, we will reply with the next steps in the process.

Add / Remove Enterprise Admin(s)

Add or remove Enterprise Admins to allow them to oversee and manage all aspects of accounts within the Enterprise.

Who Can Do This: Enterprise Admins.

To add or remove an Enterprise Admin:

Begin the Process in one of the following ways:

- Log into your Enterprise Admin profile and contact us from within Pipeline.

- Send us an email from the email address associated with your Enterprise Admin profile.

Once you've contacted us, we will reply with the next steps in the process.

Designate Master Admin(s) for an Individual Account

Designate Master Admins to grant them oversight and control over all aspects of an individual account, including unrestricted access to all data, the authority to manage account settings, and more.

Who Can Do This: Enterprise Admins can designate Master Admins on any account in the Enterprise. Master Admins on an account can designate additional Master Admins for their account.

To designate an individual account's Master Admin(s):

Access Account:

- Access the account for which you want to appoint a Master Admin.

Go to Manage Users :

- Click your name in the upper right corner, then [Admin / Settings].

- Select [Manage Users] from the People section of the left menu.

Grant Permission:

- Grant Master Admin permission as normal. Learn how →