

Understanding Paperless Pipeline (for Agents)

For businesses with multiple accounts, Paperless Pipeline's Enterprise Portal offers seamless, integrated control. From one central location, designated administrators can manage all accounts, create new ones, and handle billing tasks.

Introduction

While managing a growing company in a single Paperless Pipeline account is possible, some expanding operations may require a broader approach. If you need to oversee multiple Paperless Pipeline accounts across various branches of your business, the Enterprise Portal streamlines your administrative process across accounts.

The Enterprise Portal benefits various business types, providing centralized oversight specifically for those who hold total authority over all accounts within their business structure. It streamlines operations for brokerages, ensures uniformity across branch or franchise accounts, offers customized configurations for transaction management firms, and more.

Whether expanding your team, diversifying services, or entering new markets, you and other designated admins will have the tools to effortlessly oversee multiple accounts and efficiently manage the entire company from a convenient, centralized area.

Benefits

The Enterprise Portal unlocks several benefits across your accounts, including:

- **Centralized Control:** Oversee all accounts within your Enterprise from a central Enterprise Portal.
- **Easy Account Setup & Management:** Add new accounts, access and manage existing ones, and seamlessly return to the Enterprise Portal for an overview of all accounts.
- **Flexible Billing Options:** Enterprise Admins can update credit card information for individual or multiple accounts at once, as well as allow Master Admins to manage credit card information for their individual accounts.

Who It's For

The Enterprise Portal is designed explicitly for authorized personnel who oversee, control, and possess ultimate authority over all Paperless Pipeline accounts within a single business entity.

Ideal for:

- **Real Estate Brokerages:** Administer separate accounts for different branches or teams under one centralized system.
- **Corporate Groups:** Supervise multiple accounts for different departments or offices within a larger entity.
- **Franchise Operations:** Manage individual accounts for each franchise, ensuring uniform operations across locations.

- **Property Management Companies:** Establish distinct accounts tailored to different ownership or management structures.
- **Transaction Management Firms:** Manage separate accounts for various brokerages or agent groups, offering highly customizable options for diverse clients.

How It Works

When you're ready to streamline your administrative process, requesting to become an Enterprise is the first step.

If approved, your accounts will be considered part of your Enterprise in Paperless Pipeline, and you'll unlock access to the Enterprise Portal.

From the portal, Enterprise Admins have streamlined access to manage all accounts, including adding, managing, and monitoring accounts and handling billing information.

For individual accounts within the Enterprise, Master Admins still maintain their Master Admin permissions. By default, they are restricted from updating payment information, but that ability can be turned on by an Enterprise Admin.

Getting Started

To integrate your accounts and become an Enterprise in Paperless Pipeline, [unlock access here →](#).

Using Paperless Pipeline

As an Enterprise in Paperless Pipeline, you gain access to the Enterprise Portal, which streamlines management across multiple accounts. [Learn more →](#)