Account Settings

Your account settings control how your company uses Paperless Pipeline, including who can log in, how transactions move through your workflow, and which advanced features are available.

Introduction

People

Locations

Users

Contacts

Contact Roles

Customize

Company Settings

Company Settings let you shape how Paperless Pipeline works for your business. They define your company identity, control key behaviors across documents, transactions, and checklists, and determine how your team interacts with the system.

Learn how to Manage Company Settings

Transaction Statuses

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Document Labels

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Checklists

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