

Adding Users

SUMMARY

Users in Paperless Pipeline are people (such as agents and staff) who can log in to a company's account.

Short version: 1) [Go to Admin / Settings](#)

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

2) Click [\[Manage Users\]](#). 3) Click [\[Add User\]](#). 4) Complete the form to create a new user. 5) Click [\[Add User\]](#) to finish.

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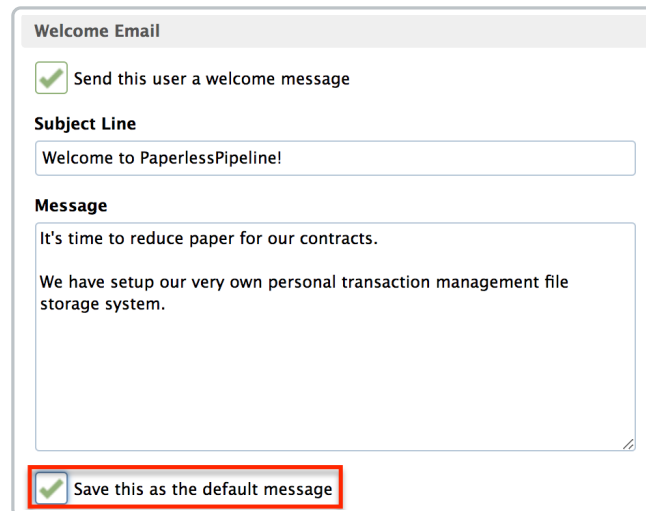
 1:04

Add a User

To add a user in Paperless Pipeline:

- 1 **Go to Admin / Settings**
 - Click your name in the upper right corner, then [\[Admin / Settings\]](#).
- 2 **Click [\[Manage Users\]](#).**
- 3 **Click [\[Add User\]](#).**
- 4 **Complete the form to create a new user.** Enter their first name, last name, and the email address they'll use to log in. Select their primary location - you'll still be able to give the user permissions for other locations - then enter a password. They'll use this password to log in to Pipeline and they may change it at any time.
- 5 **Determine if you want the new user to receive a welcome email containing their login info.** If so, leave the welcome message checkbox checked and confirm or edit the details of the subject and message.
- 6 **If you'd like the subject and the message to be saved for future welcome messages, click the**

[Save this as the default message] checkbox.



Welcome Email

☒ Send this user a welcome message

Subject Line

Welcome to PaperlessPipeline!

Message

It's time to reduce paper for our contracts.

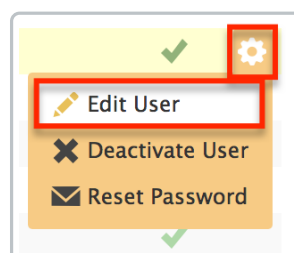
We have setup our very own personal transaction management file storage system.

☒ Save this as the default message

Set User Permissions

Permissions allow admins to control what actions a user can perform. To set user permissions:

- 1 Expand the location if necessary and check the boxes next to the permissions you would like to grant the user.
- 2 Since permissions are granted by location, specify separate permissions for each location. Learn about each permission by hovering over the item and viewing the help text to the right.
- 3 Click [Add User] to save the user. User account info may be updated at any time by returning to the Manage Users list and clicking [Actions] then [Edit User].



 [Learn more about managing user permissions →](#)