PDF-Only Restriction

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Restrict uploads to PDFs and you can preview, rotate, merge, and break apart everything that lands in your account without leaving Pipeline.

Introduction

Every tool that works on a document in place works on a PDF and nothing else. Rotating a sideways scan, merging a closing packet, splitting a stack, reading a contract without downloading it: a folder of screenshots and Word files quietly costs your team all of it.

The PDF-only restriction closes that door before anything gets in. Turn it on and Pipeline accepts PDFs and refuses the rest, whether a doc is uploaded from a computer or emailed to a maildrop address. It's one choice made once for everybody in the account, which is why it sits with the company settings rather than with each person.

You end up with a library where every document behaves the same way, which is why we suggest leaving it on. It's also worth telling your team it's on. A rejection notice reads like Pipeline refusing a perfectly good file, when it's really your own office's rule doing exactly what it was set up to do, and knowing that turns a support question into a thirty-second conversation.

How It Works

One checkbox that decides what your account takes.

Where the Setting Lives

The restriction lives in the Document Settings section of your admin settings, as **Only Allow PDF Documents**. It covers every location on the account.

What It Turns Away

With the restriction on, Pipeline turns away anything that isn't a PDF — images, Word files, spreadsheets, video. That applies to uploads and to docs emailed in, and it applies to attachments you didn't mean to send, like the logo in an email signature.

What Changes When You Allow Everything

Turn it off and you can upload any file type. Non-PDF files don't get the in-place tools: you can't rotate, merge, or break them apart in Pipeline. You can open an image file to view it; other file types you download to see.

Why We Recommend Keeping It On

A PDF-only account is one where every doc behaves the same way for everybody. Anyone who needs to put a photo or a screenshot in Pipeline can convert it to a PDF first, and then it works like everything else.

Turn the PDF-Only Restriction On or Off

Decide whether your account accepts only PDFs, or every file type.

Who Can Do This: Master admins.

To turn the PDF-only restriction on or off:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. In the Document Settings section, check or uncheck [Only allow PDF documents].
3. Click [Save Settings].

The change applies account-wide from the next upload. Files already in Pipeline stay exactly where they are.

Frequently Asked Questions

Can I upload photos or images?

Only if your account allows file types beyond PDF. With the PDF-only restriction on, a `.jpg` or `.png` is turned away. A master admin can allow all file types, or you can convert the image to a PDF and upload that.

What can't I do with a non-PDF document?

Rotate it, merge it, or break it apart. Those tools are built for PDFs and are switched off for everything else. Image files can be opened for viewing in Pipeline; other file types you download to see.

Why do you recommend PDF-only?

Because it keeps every doc workable. A PDF can be previewed, rotated, merged and split without leaving Pipeline, which saves your admins and agents real time. Anything else sits in the transaction as a file you can only download.

Why did I get a rejection notice for my email signature?

Your signature image traveled as an attachment. Pipeline ignores attachments under 100KB, but a larger logo or signature image tries to upload — and on a PDF-only account, an image is refused. Remove or shrink the image in emails you send into Pipeline and the notices stop.

It says my document isn't a PDF, but it is.

Check the acknowledgement email for the actual file name. It names the file that was refused, which is often a screenshot or signature image rather than the document you meant to send. If the named file really is a PDF, forward the acknowledgement to help@paperlesspipeline.com and we'll dig in.

Is PDF-only a Pipeline rule or our own setting?

Yours. It's a setting on your account, not a system-wide rule, and your master admin can change it at any time.