Change a Setting Across Every User at Once

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There's no bulk editor on the Manage Users page, and for most account-wide changes there doesn't need to be. Tell us the rule or send us the spreadsheet, and our Tech Team runs it across every profile at once.

Introduction

Seven hundred agents need one permission they don't have. Every profile needs a commission note. The whole roster is moving to new email addresses because the brokerage changed domains. Whatever it is, you've opened one profile, made the change, saved it, and done the arithmetic on what that costs times the size of your account.

You don't have to do that arithmetic. Pipeline doesn't ship a bulk user editor, but our Tech Team does bulk changes as a matter of routine, and the request takes two shapes depending on what you're changing. Permissions go by *rule* — name the role and the permission. Profile fields go by *spreadsheet*: download your roster, change the cells, send it back.

Both are manual work on our end, so both carry a fee that depends on the size and shape of the job, and both need your written authorization before anything runs. Neither one takes you very long.

When to Use This

- You want every agent to have a permission they don't have, and there are hundreds of them.
- Your company changed email domains and every login address has to change with it.
- Commission splits, start dates, or license numbers need updating across the whole roster.
- A batch of agents is moving to a different Location.
- You've started editing profiles one by one and realized how long it's going to take.

1. Confirm It's Really a Bulk Job

Two categories can be changed across your roster in one pass, and it's worth knowing which one you're in before you write to us.

Permissions — anything on the User Permissions section of a profile: upload docs, assign docs, change transaction status, view all transactions, and the rest. We apply these *by role*, across whichever Locations you name.

Profile fields — the details that live on the profile itself: login email address, start date, commission split, commission notes, next split threshold, license, payable LLC or corporation, and Primary Location. These travel by spreadsheet.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

> Two things people expect to find here and won't: Daily Task Reminder emails and passwords. Both are handled in step 5 — not because they're hard, but because they're genuinely per-user and there's a fast

way to do them yourself.

2. Send a Rule for Permissions

Permission changes don't need a spreadsheet, because they don't go person by person — they go by role. Write to help@paperlesspipeline.com with three things:

1. The role or roles to change — for example, everyone whose role is Agent, Broker, or Principal Broker.
2. The exact permissions to add or remove, named as they appear on a profile.
3. The Locations it should apply in — or say all of them.

That's the whole request. It works in both directions: the same pass that grants *Upload Docs* to every agent in the account can strip every permission from a role in one Location.

3. Download the User List for Profile Fields

Field changes start from your own roster, so the spreadsheet already has everyone in it and you only touch what's moving.

The Manage Users page lists everyone on your account — the active roster by default, with each person's record a click away.

See Users List

Download the User List, then edit only the columns you want changed — start date, commission split, commission notes, license, email address. Leave everything else exactly as it came out. To move people between Locations, add a column named **New Location** and put each person's new Primary Location name in it.

Moving someone's Primary Location in bulk doesn't touch their permissions in either Location — the old ones stay, the new ones still have to be granted. Primary Location says where a person sits; permissions say what they can do. If the move is meant to change their access too, ask for the permission pass in the same message.

4. Send It In With Your Authorization

Attach the spreadsheet to a message to help@paperlesspipeline.com, say plainly which columns you want applied, and include your authorization for the work and for the charge to the card on file. The authorization has to come from a master admin.

We'll come back with a quote before anything runs. Our Tech Team does bulk changes by hand, so the fee tracks the size and shape of the job rather than being one flat number — a single permission across one role is a different piece of work from a full-roster field update. Nothing is charged and nothing is changed until you've said yes to the number.

Send the file as it downloaded, with the columns intact and one row per user. A re-typed or re-ordered sheet is the thing most likely to send the request back to you for another round — and to change what

it costs.

5. Do the Per-User Leftovers Yourself

Two settings genuinely have no bulk path, and both take less time than arranging for one.

Daily Task Reminder emails are a checkbox on each profile. There's no account-wide switch and no single view of who has them on, so turning them off for a group means opening those profiles. If reminders are landing on people who don't want them, that's the fix.

Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

See Daily Task Reminder Emails

Passwords can't be set or read by anyone, including us — they're encrypted, and there's no one-click reset for everybody. What there is: **Reset Password** on the gear beside each name in Manage Users. Offices that have had to do this after a security scare put a whole roster through it in a few minutes, which is why it's the route we recommend rather than a Tech Team job.

Reset a password you've forgotten, change one you know, or reset one for an agent.

See Password Reset

One bulk job we do run at no charge: clearing a huge Unreviewed Docs backlog. If that queue has climbed past a few thousand it starts to slow the account down — send us a cutoff rule, like everything assigned before a given date, and we'll mark them Reviewed in one pass.