Cut Off Access Immediately After a Termination

Last Modified on 09/04/2026 11:10 am EDT

One action ends it: deactivating the profile kills the login, the maildrops tied to it, and Pipeline's emails to them at the same moment. The rest of this is what to check once the door is shut.

Introduction

Someone has been let go and the clock is the point. This isn't the planned offboarding where you tidy up over a week — it's the version where access has to stop now and you work out the details afterwards.

The good news is that the urgent part is genuinely one step. Deactivation is immediate and it's comprehensive: no login, no maildrop, no system mail, nothing removed. Their transactions, documents, and history stay exactly where they are, because a Pipeline profile can't be deleted, which is what protects your audit trail on the day you most need it protected.

There's one situation where you can't do it yourself, and it's worth knowing before you're in it: if the person holds master admin, master admins can't deactivate each other. That one comes through us, and we can move quickly.

When to Use This

- An employee has been terminated and their access needs to stop today.
- An admin left on bad terms and you're worried about what they can still reach.
- You've tried to deactivate someone and the option isn't available on their profile.
- You need to know which files a departed employee could open.
- An agent is leaving and you don't want documents disappearing on the way out.

Why This Beats Changing Their Password

The instinct under pressure is to lock them out by resetting their password. It's slower than it looks and leaves more open than you'd think: their maildrop addresses keep accepting documents, Pipeline keeps emailing them, and their profile keeps appearing in every dropdown as though they still work there.

Deactivation closes all of that in one move, and it does it without deleting a thing. That combination is the reason it's the answer every time: you get the hard stop of a shutdown with none of the data loss of one.

1. Deactivate the Profile

Go straight here. Manage Users, the gear beside their name, deactivate.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

From that moment they can't log in, and they drop off your active roster. Every transaction they worked, every document they uploaded, and every entry they left in the history stays put.

> Their maildrop addresses stop working too — which is right, and which will surprise the office. If a scanner or copier was programmed with that person's maildrop, documents sent to it now go nowhere. Repoint those devices at a Location maildrop or another admin's the same day.

2. If They Hold Master Admin, Write to Us First

Master admins can't edit or deactivate each other's profiles, so if the person being terminated is one, you'll find the option missing and there's no self-serve way around it.

Email help@paperlesspipeline.com and say it's urgent. We'll verify the request with a current master admin on the account and remove the flag, and you can deactivate the profile from there. Tell us in the first message that it's a termination — we can suspend access while the verification is running rather than leaving the account open.

> Nobody left who can authorize it, because the person being removed*was* your only master admin? That's a different and slower road, and it's worth starting immediately.
>
> The one person who could change anything is gone, and nobody left can change a thing. There's a way back in — it just starts with paperwork instead of a checkbox.
>
> See Take Over the Account When the Master Admin Is Gone

3. Reset Any Login They Shared

Deactivating their profile ends their own access and nothing else. If your office keeps a shared or role login — a front-desk profile, a compliance inbox, a general admin account whose password went round the room — that credential still works and they still know it.

Reset those from the same page: the gear beside the name in Manage Users has **Reset Password**. It takes seconds each, and it's the gap most offices only notice later.

Forgot your password, want to change one you know, or need to reset one for an agent? Here's every way to get a password sorted.

See Password Reset

4. Review What They Could Reach

With access closed, work out the exposure. Search on the person as an agent and you get every transaction they were on — that list is what they could open, and it's still accurate after deactivation, so you don't need to reactivate anyone to run it.

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Global Search

For what they actually did rather than what they could have done, a transaction's history records every change with a name and a date, and the Usage by Agent report shows logins and uploads across the account.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

> Can't find what you need? Write in and we can pull the list of files a given profile is attached to. It's the same list you can run yourself — sometimes it's faster to ask.

5. Repoint What Was Routed Through Them

Some things carry on pointing at a person after their profile goes quiet, and each one is a small mess later.

If their card was the one Pipeline charges, replace it before the renewal — and before their company card is canceled and the charge fails.

Pipeline keeps one credit card on file and charges it automatically each billing cycle — update it anytime from your account settings.

See Credit Card on File

And if their name is the one your team sees as the person to ask for help, change it. Otherwise your agents keep writing to a mailbox nobody reads, and Pipeline's system emails keep going out under a name that no longer works there.

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact

> Seeing a departure coming rather than reacting to one? Turn off *Delete any docs in this location* on their profile ahead of time. They can then only delete their own unreviewed uploads, and whole transactions were never theirs to delete — that's master admin only.

> When the exit is amicable and the concern is continuity rather than security, the gentler version of this covers what happens to their files and their name on your reports.
>
> An agent leaves and their work stays exactly where it is. Deactivation ends their access without touching a single transaction, document, or commission tied to their name.
>
> See Offboard a Departing Agent Without Losing Their Files