User Permissions FAQ

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Permissions control what each user can do, and most are set per location. Answers to the common questions about recommended agent permissions, admin versus master admin, and making someone a master admin.

What permissions should a typical agent have?

Create transactions, upload documents, assign docs to transactions, and assign checklist templates. That covers day-to-day agent work. Add more advanced options only as your workflow needs them. See User Permissions.

Why are permissions listed separately for each location?

Because they're granted per location. A user can have different abilities in different offices, so you'll set — and expand — each location's permissions on their own. The one exception is Download Company-Wide Backups, which is account-wide.

What's the difference between an admin and a master admin?

A master admin has everything, everywhere. Admins get the specific permissions you grant them per location; a master admin has all permissions in all locations, including billing, plan changes, and deleting transactions.

How do I make someone a master admin?

Open their profile and check the box. On the Manage Users page, click their name, scroll to **User Permissions**, expand **Account-wide Permissions** with the [+], check **Make master admin**, and save. Only an existing master admin can do it — we don't make permission changes on our end. See Master Admin.

How do I remove someone's master admin status?

Open their profile and remove master admin — they keep their regular access. Taking away master admin doesn't remove the user or their files; they stay on as a regular user with the permissions you've set. If you're unsure what an option will do, email us first.

An agent can't do something even though I granted the permission. What should I check?

Confirm it's set for the right location. Since permissions are per location, a permission granted in one office won't apply in another. Expand each location the user works in and make sure the box is checked there. If it still doesn't behave as expected, email us.

Learn More

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

See User Permissions

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.