User Permissions

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

Introduction

Two people with the same job title can end up with completely different views of your account, and that's the point. Permissions decide what each person can see and do in Paperless Pipeline, and you set them person by person rather than handing out a role and hoping it fits.

The thing that catches most admins out is where permissions live. They're granted location by location rather than once for the whole account, so somebody can be fully set up in one office and see nothing at all in another. Move an agent to a different Location and their access doesn't travel with them. That isn't a quirk. It's what makes a Location a real boundary, and how a brokerage with several offices keeps one branch's files out of another's.

Set with a bit of care, permissions hand each person exactly the reach their job needs and nothing past it. And when somebody tells you a button has vanished from their screen, permissions are usually the answer rather than a fault on their end, so what you're looking for is a checkbox, not a repair. Check which Location they're working in first, since that's where most of these end up.

How It Works

Permissions come in a few layers: a handful of agent basics, a broader set of admin abilities, one account-wide backup permission, and master admin status that grants everything.

What You Can Grant, Location by Location

You grant permissions to a person one location at a time, so somebody can be fully set up in one office and hold nothing in another. The first four below are a good starting set for an agent.

Permission	What it gives	Level
Create transactions	Start new transactions, but not change them afterward.	Agent
Upload documents	Upload files directly, or by email to their maildrop.	Agent
Assign docs to transactions	Attach their own unassigned documents to transactions they can see.	Agent
Assign checklist templates to transactions	Apply a checklist to transactions they can see.	Agent
Change transaction status · Change listing / selling agents of own transaction	The more advanced agent options, alongside adding checklists to transactions they're involved with.	Agent
View all transactions for this location · Delete any docs in this location · Review docs · Fully manage checklists and templates · Create users and locations	Company-wide abilities, so give them carefully. Several open up every agent's work, which is why they're reserved for true admins.	Admin

The One That Isn't Set by Location

Download company-wide backups is account-wide. It lets a user download Pipeline's optional monthly backups of every transaction, so grant it only to transaction coordinators and other trusted admins.

Master Admin Status

A master admin has every permission in every location, including updating billing, changing an office's monthly plan, and deleting transactions. It's a single checkbox — **Make master admin**, under *Account-wide Permissions* on the person's profile — and an existing master admin sets it themselves. Because of what it carries, read through the role before you grant it: see Master Admin.

Set a User's Permissions

> Grant or revoke a user's permissions, location by location, from their profile.

> **Who Can Do This**: Admins with the "Create users and locations" permission, and master admins.

To set a user's permissions:

1. Open the user from the Manage Users page (see User Profile).
2. Expand the location you want to set, then check the boxes for the permissions you want to grant.
3. Set permissions separately for each location, since they're granted per location.
4. To learn what a permission does, hover over it and read the help text.
5. Save the user to apply the changes.

The user's abilities update right away. You can return and adjust permissions any time.

> Any master admin can make someone else a master admin, and it's a checkbox on their profile rather than something we set for you. If nobody on the account still has master admin access, email help@paperlesspipeline.com and we'll verify the company owner before granting it.

User Permissions FAQ

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. See User Permissions FAQ.

Ways to Use User Permissions

See User Permissions at work inside a bigger job:

- Give an Assistant Access to Just That Agent's Files
- Give an Auditor Read-Only Access
- Set Up a Transaction Coordinator With the Right Access