Give Someone Access to Every File Without Making Them a Master Admin

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Master admin isn't a level of access — it's control of the account. If what someone needs is to open every file, there's a permission for exactly that, and it hands over nothing else.

Introduction

A new operations manager starts and needs to see every deal. Your transaction coordinator covers all four offices. Your broker wants to read any file in the company without asking anyone. In each case the request is about *reach*, and master admin is the first thing people reach for because it obviously delivers it.

It delivers a good deal more. Master admin includes billing and the card on file, adding and removing users, every account setting, and the ability to promote and demote anyone. It's all or nothing, with no partial version, which makes it the wrong tool for a person whose job is opening transactions.

The right tool is **View all transactions for this location**, an admin-level permission granted Location by Location. Grant it everywhere and the reach is identical to a master admin's. Everything else stays with you.

When to Use This

- A new admin needs access to all your locations and you'd rather not hand over billing.
- Your TC works files across the whole company and isn't on most of them.
- Someone needs to leave comments on other agents' documents and can't.
- You want to demote a master admin without cutting off the access they legitimately need.
- You're not sure whether View All means the same thing as full admin rights.

Why This Beats Master Admin

Everything a master admin can do falls into two buckets, and offices tend to think of them as one. The first is reach: open any transaction, in any location, without being on it. The second is control: the card on file, who has an account, what the account is configured to do, and who else gets to be a master admin.

Almost nobody asking for master admin is asking for the second bucket. They're asking for the first and taking the second because it came attached. Grant View All instead and the person gets exactly the bucket they wanted — and when they leave, or the role changes, you're adjusting checkboxes rather than negotiating over an account.

1. Decide What They Need to Reach

Sort the request before you grant anything. Master admin is the answer to a narrow set of needs — running billing, managing users and Locations, changing account-wide settings, deleting a transaction's Notes — and to nothing else.

The master admin sits at the top of your account — full access to every location, every transaction, and the settings no one else can touch.

See Master Admin

If what they need is files — opening them, uploading to them, reviewing them, commenting on them — carry on down this article.

> The permissions people most often assume require master admin don't: deleting documents, entering financial data, and generating CDAs are each their own grantable switch. Deleting a transaction's Notes is the one genuine exception, since that log is the audit trail.

2. Add Them as Their Own User

If they aren't in Pipeline yet, give them a profile of their own before granting anything. Never repurpose someone else's — a profile is signed to everything it has ever done, and renaming it relabels that history rather than moving it.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

3. Grant View All in Every Location

This is the step that does the work. Open their profile in Manage Users, scroll to **User Permissions**, and expand each Location in turn with the [+]. In every Location you want them to reach, check **View all transactions for this location (admin-level permission)**, along with whatever else the job needs — upload docs, assign docs, review docs, change transaction status. Then save.

Permissions are held per Location and nothing carries between them, so an account with six offices means six expansions. That repetition is also the control: stop granting partway down the list and you've built a regional manager instead.

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

See User Permissions

> Only one office? That's the same permission with a shorter list, and it's the standard branch manager setup.
>
> Your branch manager runs one office, and their access should stop at its door. Pipeline scopes every permission by location, so it can.
>
> See Give a Branch Manager Access to Only Their Office

> View All is broad by design — every transaction in that Location, including deals the person has nothing to do with. Give it to people you'd trust with the filing cabinet, and grant it Location by Location rather than everywhere out of habit.

4. Leave the Boxes You Don't Want Checked

The permission list is where the shape of the role gets decided, so read down it rather than checking everything above View All. An admin who should run day-to-day work but never restructure your checklists gets every box except *Fully manage checklists and templates*. One who shouldn't touch the money gets everything except the financial permissions.

This is also how you demote an existing master admin without breaking them. Remove master admin from their profile, then go through User Permissions and check only what they should keep — they land as a regular user with a deliberate set of abilities rather than losing access to work they're still responsible for.

A location admin runs the day-to-day inside the locations they're given — reviewing docs, managing checklists, and seeing every transaction there.

See [Admin - Staff (Location Admin)]

5. Set the Location's Contact Separately

One last thing that trips people, because the names sound alike: the *Primary Location Contact* — sometimes called the primary admin — is not a permission and grants nothing. It's a Location setting that decides whose name your system emails come from and who your team sees as the person to ask for help.

So if this new person is also becoming the face of an office, set that separately. And if they aren't, granting them View All doesn't change whose name is on your agents' Home page.

Give each Location a primary contact so agents know who to reply to, and system emails come from the right person.

See [Primary Location Contact]