Hand Off Master Admin When the Current One Is Leaving

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Your master admin is the only person who can hand the role to the next one. Do it while they're still here and the account changes hands cleanly — the keys, the bill, and the name on the door.

Introduction

A broker retires. The transaction coordinator who set everything up moves on. The brokerage changes hands and the new owner needs to be on the account. Whatever the reason, one person currently holds the top of your Pipeline account and someone else is about to.

There are two halves to this, and offices usually remember the first and forget the second. The first is access: who can get into every location, every transaction, and the settings no one else can touch. The second is ownership: who Pipeline bills, who Pipeline will accept instructions from, and whose name your team sees when they need help. Both move, and they move in different places.

The whole thing hinges on timing. A current master admin grants the role, from inside Pipeline. While the departing person can still log in, this takes about five minutes. After they're gone, it takes paperwork.

When to Use This

- Your broker or office manager is retiring and someone else is taking over the account.
- Your transaction coordinator is leaving and she's the only master admin you have.
- The brokerage changed hands and the new owner needs to be on the account and on the bill.
- You want a second master admin so one person leaving can't lock everyone out.
- Your master admin already left, and now nobody can reach billing or change anything.

Why This Beats Renaming Their Profile

The instinct is to reach for the departing person's profile and type over it — new name, new email, same login, done in thirty seconds. Don't. That profile is signed to everything they ever did in your account, and renaming it doesn't move that history, it relabels it. Every doc they reviewed and every transaction they touched now reads as though the new person did it. We recommend against this every time it's asked, and it's asked often. Keep profiles one per person: the successor gets their own, the departing one gets turned off, and the record of who did what survives both.

The other instinct is to leave it until later, or to email us and let us handle it. We can't — for security, we don't change user permissions on our end, and that includes master admin. It has to come from a master admin who is logged in. That's fine while the departing one is still here and a problem the day after, because the account has no one left who can promote anyone. At that point you're not clicking a checkbox, you're sending us proof that you own the company. Do this before the last day.

1. Decide Who Takes Over

Master admin has no ceiling, so the question isn't who deserves it — it's who genuinely needs it and can carry it.

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

> An account can have more than one master admin, and more than one is the point. A second master admin costs nothing and is the cheapest insurance there is against exactly the situation this article exists for — add one now, while you have someone who can.

2. Add the Successor to the Account

Skip this if they're already in Pipeline. If they're new, they need their own profile before you can give them anything — and their own profile is the whole point.

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 the Successor Master Admin

This is the step the departing master admin has to be present for, and it's the one everything else waits on. A current master admin does it from inside Pipeline — we can't do it for you.

To grant master admin:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Click [Manage Users].
2. Click the name of the person taking over.
3. Scroll down to **User Permissions**, then click the [+] to the left of **Account-wide Permissions**.
4. Check the box next to "Make master admin (Review permissions before granting)."
5. Save the user.

They're a master admin from that moment, alongside the current one. Nothing is taken away from anybody yet — that's step 7, and it comes last on purpose.

> Pipeline's account mail follows the role automatically. Every master admin on the account receives the monthly Payment Receipt and the Monthly Backup Reminder from the moment they're granted the role, and there's no setting that sends them somewhere else. So the new master admin starts getting the account's mail on their own — and the departing one keeps getting it until step 7.

> Already gone? If nobody left in the account is a master admin, this checkbox isn't available to anyone and there's no self-serve way back in. Email us at help@paperlesspipeline.com and we'll verify who owns the company before we authorize the change. What we accept as proof: Articles of Incorporation, a Certificate of Formation, a company website that lists you as the owner, or your broker license. It works, but it takes days rather than minutes — which is the argument for doing all of this a week early.

4. Hand Over the Card Pipeline Charges

Access moved; the bill didn't. If the departing person's card is the one on file, it keeps getting charged until someone changes it — and it starts failing the moment their company card is closed.

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

5. Update the Legal Company Owner

The Legal Company Owner is a separate thing from master admin, and it's worth understanding rather than skipping, because it's the field that saves you the next time someone leaves. It records who actually owns the business. Whoever is named there can authorize adding or removing a master admin, and can authorize closing the account — without holding master admin themselves. It's the safety net under step 3's warning.

We handle this change on our end for security. Email us at help@paperlesspipeline.com with who should be listed as the Legal Company Owner going forward, and we'll take care of it.

> Closing the office rather than replacing a person? That's a different path, and it runs through the same two roles — a master admin, or the Legal Company Owner you just set.
>
> Ready to close your Paperless Pipeline account? Our team handles cancellation, and your master admin starts it with a single message.
>
> See Account Cancellation

6. Point the Admin & Support Contact at the New Person

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

7. Remove Master Admin From the Departing Profile

Now that someone else holds the role, take it back from the person leaving. Do it in this order — never the other way around, or you'll strand the account between the two.

To remove master admin from a profile:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Click [Manage Users].

2. Click the gear next to the departing person's name.

3. Click [Remove Master Admin].

They're a regular user again, with whatever permissions you've set for them. Removing master admin doesn't remove them from the account and doesn't touch a thing they've done.

> You can't remove master admin from the profile you're currently logged in as. If the departing person is doing their own removal, they'll find the option isn't there. The successor logs in and removes it from the departing profile instead — one more reason the new master admin goes on first.

8. Deactivate the Departing Profile

Last, close the door. They're no longer a master admin, but they can still log in and see everything their remaining permissions allow until you turn the profile off.

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

See User Deactivation