

Master Admin FAQ

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Master admins can do everything and see everything, and a few actions belong to them alone. Answers to the common questions about billing access, changing who's a master admin, and fixing a master admin's details.

What can only a master admin do?

Billing, deleting transactions, upgrading or downgrading the account, and account-level setup. That includes managing billing and receiving billing receipts, deleting transactions and transaction notes, changing the location of existing transactions, setting up transaction statuses and labels, document labels and standard document names, business holidays, and requesting master admin or cancellation changes. No other role can do these.

How do I add or change a master admin?

You do it yourself — it's a checkbox. On the Manage Users page, click the person's name, scroll to **User Permissions**, expand **Account-wide Permissions** with the [+], check **Make master admin**, and save. Removing it works the same way. See [Master Admin](#).

Can I manage master admins myself from settings?

Yes — and it has to be you. For security we don't make permission changes on our end, master admin included. An existing master admin grants or removes it from the person's profile under *Account-wide Permissions*. The one thing we do handle is correcting a master admin's *name*.

Can I remove someone as master admin but keep them as an agent?

Yes. Removing master admin access doesn't remove the person from the account — they can stay on as an agent or location admin and keep access to their files. Uncheck **Make master admin** on their profile, then set the permissions they should keep.

My master admin's name is spelled wrong. How do I fix it?

Email us the correction. Send the right spelling to help@paperlesspipeline.com and we'll update the master admin's name — this doesn't change who the master admin is.

We want admins who can't see billing. Is there a middle tier?

Use a location admin. If someone needs admin-level access to work but shouldn't touch billing or account settings, make them a location admin with only the permissions they need. Master admin is all-or-nothing; location admin is where you draw the line. See [Admin / Staff \(Location Admin\)](#).

Learn More

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](#)

Still Have Questions?

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