Master Admin

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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.

Introduction

Every account has a master admin, and in most offices it's whoever set Pipeline up. The role tends to spread from there, usually because somebody needed to see something and this was the quickest way to let them.

It's worth being deliberate about, because master admin isn't a level of access so much as control of your account itself. It carries billing and the card on file, adding and removing people, every company setting, and the ability to promote or demote anyone else, including the person who granted it. There's no partial version and nothing to switch off, which is what makes it the wrong answer to most requests that sound like they need it.

Held by the right people, it's the role that lets someone genuinely run your account and answer for it. If what somebody actually needs is to open every file, that's a permission of its own, and it hands over nothing else.

How It Works

Beyond being able to perform every action and view all data, a master admin holds a set of permissions no other user has.

What Only a Master Admin Can Do

These actions are exclusive to master admins — no other staff can perform them:

- Manage billing and receive monthly billing receipts
- Upgrade or downgrade the account
- Delete transactions
- Delete notes on transactions
- Change the location of existing transactions
- Set up transaction statuses, transaction labels, and document labels
- Set up standard document names
- Set up yearly business holidays
- Request that a master admin be added, removed, or changed
- Request cancellation of the account

Who Should Be a Master Admin

Because the role has no limits, it's best kept to the people who genuinely need it. Master admin permissions are meant for users who are trained in Pipeline's admin functions, are authorized to access all data across the account, and hold ultimate accountability for it. If someone needs admin-level access within certain locations but shouldn't touch billing or account-level settings, a location admin is usually the better fit.

Adding or Changing a Master Admin

A master admin does this themselves, in the app — we don't make permission changes on our end, for the same security reason the role exists. It's a checkbox on the person's profile.

> **Good to know**: Removing someone as a master admin doesn't remove them from the account — they can stay on as an agent or location admin and keep access to their files. Just clear the checkbox and set the permissions they should keep.

Make Someone a Master Admin

Check *Make master admin* on the person's profile under Account-wide Permissions.

Who Can Do This: An existing master admin.

To make someone a master admin:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users], then click the person's name.
3. Scroll to **User Permissions** and click the [+] to the left of **Account-wide Permissions**.
4. Check **Make master admin**. Read through what the role carries before you do — it's every permission in every location.
5. Click [Update User].

They're a master admin from their next sign-in, with billing, plans, and every location included.

Remove Someone as a Master Admin

Clear the *Make master admin* checkbox, then set the permissions they should keep.

Who Can Do This: An existing master admin.

To remove someone as a master admin:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users], then click the person's name.
3. Scroll to **User Permissions** and click the [+] to the left of **Account-wide Permissions**.
4. Uncheck **Make master admin**, then set whatever permissions they should keep as an agent or location admin.
5. Click [Update User].

They stay on the account with their files and history intact — they just no longer hold the account-level keys.

> Keep at least one master admin on the account at all times. If the current one is leaving, grant the role to their successor before you remove it from them — see Hand Off Master Admin When the Current One Is

Leaving.

When the Request Doesn't Need the Whole Account

Most asks that sound like master admin are really about one office. There's no box that says admin — you make someone one by giving them the run of the locations you name, and nothing outside them.

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)

Frequently Asked Questions

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).