Member Accounts

Last Modified on 11/10/2026 12:23 pm EST

The accounts inside your Enterprise are still whole accounts, with their own users, their own settings, and their own bill. The portal is how you reach them.

Introduction

The worry when offices get grouped together is that they stop being their own. Somebody's name comes off the door, their settings get overwritten, and their bill turns into a share of somebody else's.

That isn't what an Enterprise does. Every account inside one stays a whole Paperless Pipeline account: its own company name and license, its own people and permissions, its own transactions, its own plan and monthly bill. What the Enterprise adds sits above them rather than inside them, as one list of every account and a way into each one from that list. That separation is also why bringing an account in doesn't move anything. Grouping accounts changes who administers them, not where the data lives.

An office that leaves keeps its account and its history, because it was never dissolved into anything in the first place. That's oversight without a merge, and it matters most when the shape of the organization changes. The portal is where you add them, open them, and remove them, and each one goes on being the account it always was.

How It Works

Manage Accounts is the list, and everything on this page starts there.

What Each Account Keeps

- Its own company name, brokerage license number, and logo
- Its own locations, users, and permissions
- Its own transactions, documents, and reports
- Its own transaction plan and monthly bill
- Its own logins

What the Enterprise Adds

From the portal, an Enterprise Admin can add a new account, open any existing account and work in it as an admin, update the card on file, and ask us to remove an account from the Enterprise. The list itself is the overview — every account in the organization, in one place.

The Account List

Manage Accounts shows every account in your Enterprise. When you have more accounts than fit on a page, the [Next] and [Last] buttons in the upper-right corner move you through them.

Adding an Account Doesn't Move Any Data

Bringing an account into your Enterprise changes who administers it. It doesn't move transactions, documents, or users from one account to another — that's a separate, paid data transfer our tech team runs, and it works the same

whether the accounts are in an Enterprise or not.

Add a New Account to Your Enterprise

Create a brand-new Pipeline account inside your Enterprise, straight from the portal.

Who Can Do This: Enterprise Admins.

To add a new account to your Enterprise:

1. Open your Enterprise Portal.
2. Click [Add Office Account].
3. Fill in the information about the new account — its name, address, and the other details on the form.
4. Submit the form.

The new account appears in your Enterprise Portal, ready for you to open and set up.

Move an Existing Account Into Your Enterprise

An account that already exists can join your Enterprise once its current master admin authorizes it.

Who Can Do This: Enterprise Admins, with written authorization from the account's current master admin.

To move an existing account into your Enterprise:

1. From your Enterprise Admin profile, click [Help] in the upper-right corner and choose [Get Help], or email help@paperlesspipeline.com from your Enterprise Admin address.
2. Give us the account's company name and its Pipeline account ID, and confirm you want it added to your Enterprise.
3. Wait while we reach the account's current master admin for written authorization.

Once that authorization is in, we add the account to your Enterprise and set your Enterprise Admin email up on it. From then on it appears on your Manage Accounts list like any other.

Open an Account From Your Enterprise Portal

Sign in to any account in your Enterprise from the portal, without losing your place in it.

Who Can Do This: Enterprise Admins.

To open an account from your Enterprise Portal:

1. Open your Enterprise Portal.
2. Find the account you want in the list.
3. Click the account's [Gear], then [Manage / Setup].

4. Select your **Email** from the list, then enter your **Password**.
5. Click [Log In].

You land in the account with full admin access — settings, transactions, users, reports, and everything else.

Return to Your Enterprise Portal

Switch back from an account you opened to your overview of all accounts.

Who Can Do This: Enterprise Admins.

To return to your Enterprise Portal:

1. While you're in the account, click the [Gear] in the upper-right corner.
2. Click [Return to Your Offices].

You're back on your Manage Accounts list, with every account in view.

Remove an Account From Your Enterprise

An office leaving the Enterprise keeps its account and everything in it. The account just stops being yours to administer.

Who Can Do This: Enterprise Admins, in writing.

To remove an account from your Enterprise:

1. Email help@paperlesspipeline.com from your Enterprise Admin address.
2. Tell us the account's Pipeline ID, the date the removal should take effect, and whether ownership is transferring to someone else.
3. Include the new owner's name and email address if ownership is transferring, so we can verify it before we act.

Removals usually take one to two business days. We take the account out of the Enterprise and deactivate the Enterprise's admin user inside it, then let the remaining master admin know the account is theirs — including the bill, which needs a card on file before the next billing date. Account changes like this run Monday through Friday.

Frequently Asked Questions

Can an account that already exists join our Enterprise?

Yes, with its current master admin's written authorization. Send us the company name and Pipeline account ID; we confirm with the account's master admin and complete the move.

What happens to an account when it leaves the Enterprise?

It keeps running, on its own. We remove it from the Enterprise and deactivate the Enterprise's admin user inside it.

The remaining master admin takes ownership of the account, including the bill, and needs a card on file before the next billing date. It usually takes one to two business days.

Does removing an account from our Enterprise delete or move its data?

No. The account, its transactions, its documents, and its users all stay exactly where they are. The only thing that changes is who administers it.

Can we move transactions or users between two accounts in our Enterprise?

That's a separate, paid data transfer. Being in the same Enterprise doesn't change how it works — our tech team moves a Location, with its users and transactions, from one account to another.

Who pays for each account in the Enterprise?

Each account carries its own transaction plan and its own monthly bill. The Enterprise doesn't pool them into one subscription. What it does give you is one place to keep the cards on file current, and one monthly report across all of them.

Can an account be removed from the Enterprise on a weekend?

No — account changes run Monday through Friday. Pick an effective date on a business day. Paid data transfers are the exception; those are scheduled on weekends on purpose, to keep them out of your working hours.