Admin Settings

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Every company-wide switch in one place: the Gear in the upper-right corner, then Admin / Settings. This is that page, section by section, with where each setting is explained.

Introduction

Admin / Settings is where a master admin shapes the account and where location admins run their offices. It opens on Company Settings, and its left menu runs in seven groups: People, Customize, Templates, Backups, Billing, Add-On Modules, and Integrations. This page follows the same order.

Most of what is here is set once and inherited by every office. The page tells you what each switch does with a tooltip; this page tells you where the longer answer lives.

People

Offices, the people in them, and the contacts and roles your transactions carry.

Open an Office or a Team

A Location gives a group its own users, transactions, and permissions.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location

Its Name and Contact Details

The name labels the office everywhere, and the contact info prints on its coversheets.

Every Location has a name that identifies it across Pipeline — and you can update that name anytime.

See Location Info

Who Its Agents Reply To

System emails to the office's agents go out under this person's name.

Give each Location a primary contact so agent replies to system emails reach the right person.

See Primary Location Contact

Retire One You No Longer Run

Deactivating takes it off the list and keeps everything that happened in it.

Deactivate a Location you no longer use to keep your Locations list focused on the offices and teams you're actively running.

See Location Deactivation

Add Someone

Each person logs in and works under their own account.

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

Send Login Details When Ready

Nothing reaches a new user until you send the welcome email.

Send new users their login details the moment you're ready — and not a second before.

See Welcome Emails

What Each Person Can Do

Set per person, per location, which is why one person can be an admin in one office and an agent in another.

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

See User Permissions

Close Access When Someone Leaves

Deactivating keeps their work and takes away the access.

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

See User Deactivation

Bring Someone Back

Reactivate the profile and their history comes back attached to them.

Bring a former user back into Pipeline with their history intact.

See User Reactivation

Everyone on the Account

The active roster by default, each person's record a click away.

The Manage Users page lists everyone on your account — the active roster by default, with each person's record a click away.

See Users List

Find One Person

Search the page by name, email, or role.

Narrow the Manage Users page to the person or group you need — search by name, by email, or by role.

See User Search

The Top of the Account

Full access to every location and the settings nobody else can touch.

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

Someone Who Runs One Office

Reviews docs, manages checklists, and sees every transaction in the locations they are given.

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)

What an Agent Sees

Their own transactions, documents, and checklists, and nothing they do not need.

Agents see and manage their own work: their transactions, their documents, their checklists, and nothing they don't need.

See Agents

The Day's Tasks Each Morning

Overdue, due today, and due tomorrow, in one email; an admin sets it for each agent.

Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

See Daily Task Reminder Emails

What a Contact Holds

Role, name, company, email, phone, and fax; two are required.

Every contact you add carries the same short set of details: role, name, company, email, phone, and fax. Two of them are required and the rest are yours to fill in as you get them.

See Contact Fields

People You Have Used Before

Type a few letters and Pipeline offers the escrow officer you added last month, details and all.

Type a few letters and Pipeline offers the people you've already worked with, details and all — so a repeat escrow

officer or lender lands on the transaction without retyping a thing.

See Auto-suggested Contacts

The Roles Contacts Carry

Free text that becomes a suggestion after its first use, so agree the wording early.

A Contact Role says what someone does on the transaction — buyer, lender, escrow officer, attorney. Type a new one once and Pipeline offers it back to you the next time.

See Contact Roles

Customize

Company Settings first, then the lists and fields your transactions and docs use.

Every Account-wide Setting

The page Admin / Settings opens on, and the first link under Customize.

The page Admin / Settings opens on: every account-wide setting, box by box in the order you see it, with where each one is explained.

See Company Settings

Where a Deal Stands

You name the statuses; the category behind each one is what Pipeline reads, and it is fixed once set.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

What Kind of Deal It Is

One label per transaction, and the thing a checklist rule reads alongside status and side.

Labels are your transaction types, from property types to the other kinds of deals your office works, and they drive the checklists Pipeline auto-assigns.

See Transaction Labels

Fourteen Colours You Name

A label organizes and never changes who can open a doc.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See Doc Labels

The Names Everyone Files Under

Paste in the forms your offices file and give each a default permission category; every agent then names the same form the same way.

Build a shared list of your company's document names, and everyone on your team names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

Where Business Comes From

Your own list of channels, one per side of a deal, reported on later.

Track where your business comes from by tagging each transaction with its lead source, then measure what's working on reports.

See Lead Sources

Fields Nobody Prebuilt

Build your own and Pipeline treats them like every other transaction detail.

Build the fields your office needs, and Pipeline treats them like every other transaction detail.

See Custom Fields

Templates

The days your office is closed, and the checklists your deals run on.

The Days Your Office Is Closed

Weekends are skipped on their own; your holidays are skipped once you list them, a year at a time.

Tell Pipeline which days your office is closed, and business-day due dates step right over them.

See Business Holidays

The Templates Your Office Runs On

Build a checklist once and Pipeline applies it to every transaction that needs it.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

Build a New One

Name it, pick the locations that use it, and load it with the tasks a deal depends on.

Build a new checklist template from scratch — name it, pick the locations that use it, and load it with the tasks a deal depends on.

See Adding a Checklist Template

What a Task Is

The documents to collect and the steps to finish on a transaction.

The tasks on a checklist are the documents to collect and the steps to finish on a transaction.

See Document Names or Tasks to Track

The Dates the Deal Turns On

Flag a task as a key date and it flows to coversheets, calendars, and email.

Mark a task as a key date and its deadline flows onto coversheets, calendars, and your emails.

See Key Dates

Dates That Work Themselves Out

Write the rule once on the template and every deal arrives with the date filled in.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

Who Sees Each Task

An agent sees their share and the back office sees theirs; reminders follow visibility.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

Whose Task It Is

Type @ and a name or a role in the task and it is highlighted for them wherever they look.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

Checklists That Apply Themselves

A rule watches status, side, and label and adds the template the moment a transaction matches.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules

Backups

A Copy Every Month

A downloadable copy of the account, documents included, built each month.

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

Billing

Upgrade / Downgrade, Update Credit Card and Billing History, then the Current Usage panel below the menu.

Your Plan

A ladder you move up or down as your volume changes.

Pipeline bills on a simple monthly transaction plan — a ladder you move up or down as your deal volume changes.

See Transaction Plans

Keep the Records Without the Service

Your data stays online and read-only for a low monthly rate.

The Archive Plan keeps your Pipeline data online and read-only for a low monthly rate, so you can step away from the service without leaving your records behind.

See Archive Plan

Past the Quota Without Upgrading

Opt in and each extra transaction bills at a flat rate.

Overages let you go past your monthly quota without a full upgrade — Pipeline bills each extra transaction at a flat rate.

See Transaction Overages

Closing the Account

Our team handles it; the master admin starts it with one message.

Ready to close your Paperless Pipeline account? Our team handles cancellation, and your master admin starts it with a single message.

See Account Cancellation

The Card on File

One card, charged automatically each cycle.

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

Every Charge, and the Paid-Through Date

The record of what you paid and when, with receipts to download.

Your Billing History page is the record of every Pipeline charge — what you paid, when, and the date your account is paid through.

See Billing History

This Month's Meter

Transactions used, transactions left, and when the quota resets.

The Current Usage panel is your at-a-glance meter — transactions used, transactions left, and when the quota resets.

See Current Usage

When the Cycle Turns

Your quota resets and your card is charged on your bill date.

Your plan renews on a monthly cycle: your transaction quota resets, and Pipeline charges your card on your bill date.

See Billing Cycle

Add-On Modules

Turn On Commissions

A master admin switches the module on from inside the account; the first 30 days are free.

Ready to run commissions out of Pipeline? A master admin can switch the Commission Module on from inside your account, and the first 30 days are free.

See Commission Module Activation

Each Office's CDA Rules

Who gets paid directly, whose signature signs, and what the title company reads.

Set up Commission & CDA Settings for each of your offices to decide who gets paid directly, whose signature signs the CDA, and what instructions your title company reads.

See Commission & CDA Settings

Pipeline AI

The switch, the Monthly Spending Limit, and who can run it, on one page.

Pipeline AI stays off until a master admin turns it on, and the page that turns it on also sets the most it can cost in a month and who on your team can run it.

See Pipeline AI Settings

Pipeline eSign

The free trial, the switch, the monthly limit, and the team's usage, on one page.

Pipeline eSign arrives switched off. From one page a master admin turns it on, sets the most it can cost in a month, and watches what the team sends.

See Pipeline eSign Settings

Integrations

Zapier

A transaction changing status kicks off whatever comes next in QuickBooks, your CRM, or a spreadsheet.

Connect Pipeline to QuickBooks, your CRM, or a spreadsheet, and let a transaction changing status kick off whatever comes next.

See Zapier Integration

Your Own DocuSign Account

Send for signature from a transaction and signed copies come back on their own.

Connect your own DocuSign account to Pipeline and send documents for signature without leaving a transaction — signed copies come back on their own.

See DocuSign Integration