

Master Admin Permissions

SUMMARY

Master admin permissions are reserved for those who have been trained on admin functions of the system, have authority to view all data throughout the account, and will have ultimate accountability for all areas of the account. Learn more about master admin permissions in the following article.


Master Admin Permissions

An account's master admin has all permissions and access to all data. A master admin is different from admin staff who are users with specific permissions to view all transactions, review docs, and other admin-level access.

Every account has at least one master admin. Besides being able to perform all actions and view all data, a master admin has exclusive permissions to the following actions (no other staff can perform these actions):

- Managing billing
- Deleting transactions
- Upgrading and downgrading the account
- Setting up transaction statuses
- Setting up standard document names
- Setting up transaction labels
- Setting up document labels
- Setting up yearly business holidays
- Receiving monthly billing receipts
- Changing locations of existing transactions
- Deleting notes on transactions
- Requesting removal/addition/modifications of master admins

- Requesting cancellation of the account

 An existing master admin or the business owner must authorize the addition of another master admin on the account. Email us to request that an existing user be given master admin privileges:

help@paperlesspipeline.com