Add & Manage Offices In Your Organization

Access your Enterprise Portal to oversee all accounts within your Enterprise.

Who Can Do This? Enterprise Admins.

To access accounts in your Enterprise:

1 Go to Your Enterprise Portal :

- From your Enterprise Admin profile, click your name in the upper right corner, then [Admin / Settings].
- Select [Manage Accounts] from the Enterprise Portal section of the left menu.

2 View Accounts:

• You'll see a list of accounts belonging to your Enterprise.

Search address, mis, agent, seller	buyer Q $_{\rm int}$ Transactions Tasks Unassigned Unreviewed Reports Reference	+ ? Help ເ⊛ №	Monta S.
	Enterprise Accounts		
 People Manage Locations 	Bulk v Units Report + Add Account		
Manage Users	Name		
Manage Contacts	Dreamscape Realty		63
Manage Contact Roles	Horizon Haven Properties		63
	Elite Vista Estates		£63
- Customize	Serenity Summit Realty		£63
Company Settings	Stellar Skyline Investments		£33
Transaction Statuses			

Add a New Account to Your Enterprise

Add a new Paperless Pipeline account to your Enterprise to expand your business into a separate account.

Who Can Do This: Enterprise Admin can add a new account to their Enterprise.

To add a new account:

1 Go to Your Enterprise Portal :

• From your Enterprise Admin profile, click your name in the upper right corner, then

[Admin / Settings].

• Select [Manage Accounts] from the Enterprise Portal section of the left menu.



• Click [I Add Office Account].



3 Complete & Submit Form:

• Fill in the necessary information about the new account, including the name, address, and other relevant details.

• Submit the form.

The new account will appear in your Enterprise Portalwhere you can:

- •Access the account directly (described below).
- Continue setting it up.Learn how to Set Up Paperless Pipeline→

Access an Account In Your Enterprise

Access an individual account in your Enterprise to login and manage details, updates, or perform specific tasks.

Who Can Do This: Enterprise Admin can access accounts within an Enterprise.

To log into an account:

1 Go to Your Enterprise Portal :

• From your Enterprise Admin profile, click your name in the upper right corner, then [Admin / Settings].

• Select [Manage Accounts] from the Enterprise Portal section of the left menu.

2 Find & Select Account:

- Find the account you wish to access in the list.
- Click the account's gear, then [Manage / Setup].

Search address, mis, agent, seiler, buye	🔾 🏠 Transactions Tasks Unassigned Unreviewed Reports Reference	+ ? Help 🛞 Monta S.
- People	Enterprise Accounts	
Manage Locations	Bulk 👻 🕇 Add Account	
Manage Users	Name	
Manage Contacts	Dreamscape Realty	(6)
Manage Contact Roles	Horizon Haven Properties	0
	Elite Vista Estates	🔑 Manage / Setup
- Customize	Serenity Summit Realty	🗖 Update Payment Info
Company Settings	Stellar Skyline Investments	63
Transaction Statuses		

3 Log In:

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

Manage / Setup: Horizon Haven Properties			
Select which profile to log in to.			
Email			
- Choose log in email -			
horizonhavenstaff@paperlesspipeline.com			
horizonhavenadmin@paperlesspipeline.com			
Cancel Log In			

You You You You to manage Admin Settings, access transactions, rungeports, and more. Learn how to Use Paperless Pipeline→

Return to the Enterprise Portal

While accessing an account from your Enterprise Portal, return to your Enterprise Portal to switch back to your overview of all accounts.

Who Can Do This: Enterprise Admin can return to the portal from an individual account.

To return to the portal from an individual account:

1 Go to Settings Menu:

• Click your name in the upper right corner while accessing an account from your Enterprise Portal.

2 Return to Portal:

• Click [Return to Your Offices]. You'll be taken back to the portal.

Search address, mis, agent, se C	🔐 Transactions Tasks Unassigned Unreviewed Reports Reference 🛛 + ? 🞯 Horizon A.
	Announcement from your admin: ${\cal P}$ Admin / Settings
Horizon Haven Properties	Need to post an announcement? This announcement area will A Personal Profile
	[→ Sign Out (Horizon Admin)
- My Shortcuts	← Return to Enterprise Portal
To add Custom Shortcuts to this	Search Active Transactions
list, run a search and / or sort, then click the "Add Shortcut"	Q
button.	

