

Enterprise Account Management

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

Who Can Do This? Enterprise Admins.

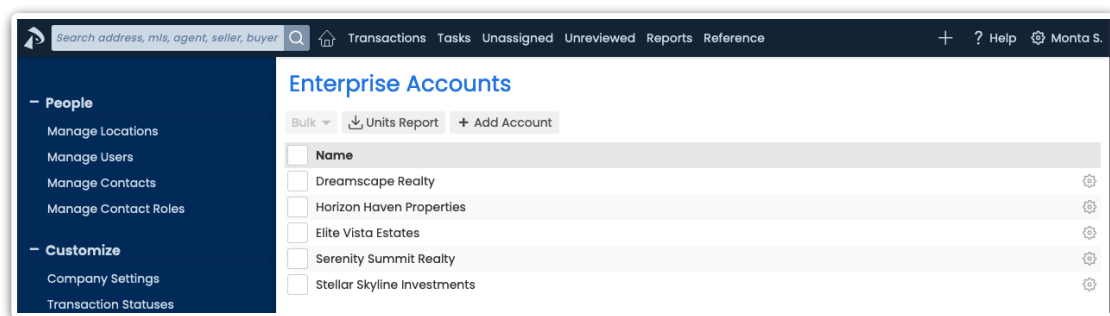
To access accounts in your Enterprise:

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.



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 :

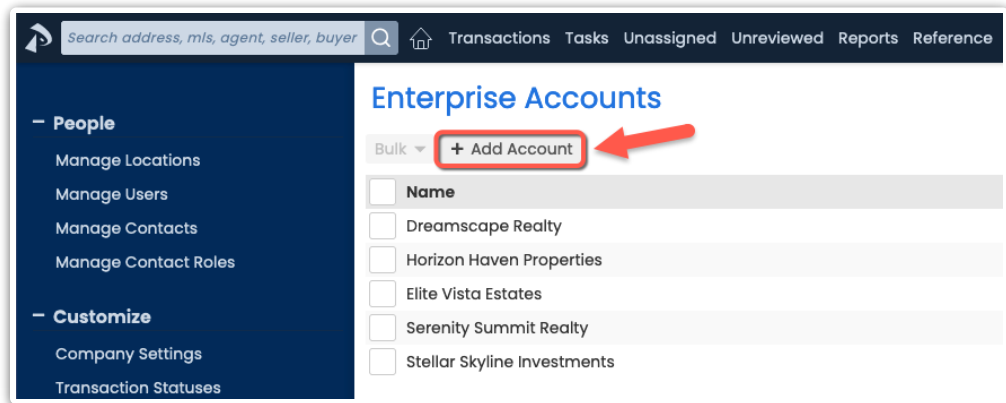
- From your Enterprise Admin profile, click your name in the upper right corner, then

[Admin / Settings].

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

2 Add Account:

- Click [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 Portal where 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:

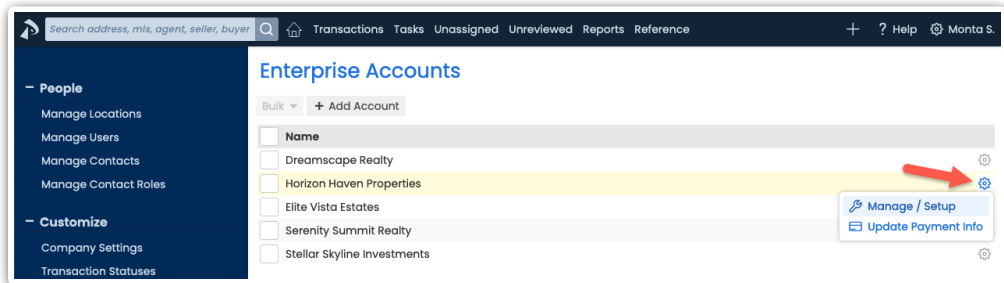
1 Go to Your Enterprise Portal :

- 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].



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'll be logged into the account, allowing you to manage Admin Settings, access transactions, run reports, 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.

