

Get your setup ready for daily Pipeline work

If you're new to Pipeline — joining a brokerage, onboarding to a new role — there's a small checklist that gets your setup ready to use Pipeline smoothly all day. Five minutes once, and you don't have to think about it again.

Introduction

Pipeline is browser-based, so "setup" mostly means making sure your browser is current and your connection is solid. Once you've done that, Pipeline runs and looks right. The small annoyances that trip newcomers up — a stale cache from years ago, an outdated Safari, a firewall stripping styles — all get headed off here.

If you're setting up a new device, do this before you start using Pipeline heavily. If you've been using Pipeline already and something feels off, the same checklist surfaces what to fix.

Why this saves you a slow afternoon later

Most "*Pipeline is slow*" or "*Pipeline looks broken*" support tickets trace to one of the items here. Doing them upfront, instead of when something already isn't working and you're under pressure, keeps a smooth day from turning into a debugging session.

1. Pick a supported browser and update it

Pipeline supports current versions of Chrome, Firefox, Edge, and Safari. If you don't have a preference, Chrome and Firefox are the easiest to keep current. They auto-update without involving the operating system. Update your browser from its *About* menu before you sign in to Pipeline.

2. Check your connection

Pipeline needs broadband — 4 Mbps download, 1 Mbps upload — to feel snappy. If you mostly work from a coffee shop or shared office, run a quick speed test on your usual network so you know what you're starting with.

3. Sign in and adjust your appearance

Once you're in, click your name in the upper-right → **[Personal Profile]** and check the *Appearance* setting. Dark Theme is available if you prefer it.

Learn how → [Login](#)

4. Add a Pipeline shortcut to your phone (optional)

If you'll be using Pipeline on a phone, add it to your home screen so it opens like an app. Full screen, no browser chrome.

Learn how → [Mobile Access](#)

5. Bookmark the Status Page

When Pipeline isn't behaving and you want a quick *"is it me or them?"* answer, the Status Page tells you. Ask support for the link if you don't have it, and bookmark it.

6. Tighten up your account security

While you're setting things up, take a minute to confirm your login email is one you actively use, and turn on Two-Factor Authentication if your office requires or supports it.

Learn how → [Login Email Address](#) · [Two-Factor Authentication](#)