

Managing Location-specific Admin

SUMMARY

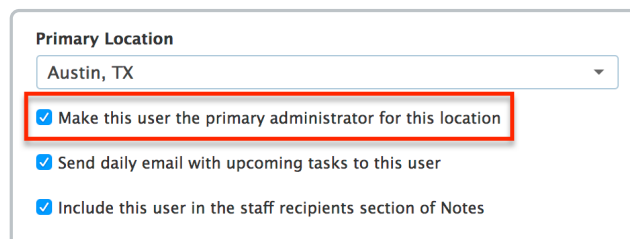
Define a primary admin for each of your locations for optimal communication with agents. All system-generated emails will be sent from this admin, giving agents the most appropriate go-to person to reply to. This article will show you how to set a location-specific admin.

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Managing Location-specific Admin

You can define a primary admin for each location. This improves communication between admins and agents. To set a user as a location admin:

- 1 Go to Admin / Settings
 - Click your name in the upper right corner, then [Admin / Settings].
- 2 Click [Manage Users] from the left menu.
- 3 Click the user's name.
- 4 Check the checkbox "Make this user the primary administrator for this location".
- 5 Click [Update User].



Primary Location

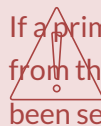
Austin, TX

☒ Make this user the primary administrator for this location

☒ Send daily email with upcoming tasks to this user

☒ Include this user in the staff recipients section of Notes

System-generated emails such as daily task reminders, expiration & closing notifications will now be sent from this admin giving agents the most appropriate go-to person for a reply.

 If a primary admin has not been specified for a location, Pipeline will send such notification emails from the Admin/Support Contact (or from the master admin if an Admin/Support contact has not been set).