Setting Up Your Company

Last Modified on 11/10/2026 12:21 pm EST

The handful of settings that identify the company, and the offices inside it. Both turn up in things your agents act on, so they come first.

Introduction

Start with the training and the setup call, then the settings every office inherits: the company name that prints on statements, the logo, the person agents are told to ask. Then the offices themselves, since everyone you add afterwards lands in one.

Most of this is set once. What comes back around is the office list: a new branch, two offices becoming one, an office moving to another account.

1. Get Trained and Book the Setup Call

Two videos on your own time, then a screen share with our team inside your actual account. Watch first and the call is spent on your office rather than on vocabulary.

Get up to speed on Pipeline with videos you can watch today and a screen share you book with our team. Which one you need depends on whether you're setting the account up or working inside it.

See Training & Onboarding

2. Name the Company

This name prints on commission statements and coversheets, so a rebrand shows up here before it shows up anywhere your customers look.

Set the company name and brokerage license number that identify your account throughout Pipeline.

See Company Name & License

3. Put Your Brand on What Goes Out

The logo carries onto Home, coversheets and commission documents. Upload it at a size that holds up in print, since the CDA is where it is most often seen.

Add your brokerage's logo so your Home page, coversheets, and commission documents all carry your brand.

See Company Logo

4. Tell Your Team Who to Ask

This name and address show on every agent's Home page and on system email. Update it when the person changes, because agents keep writing to whoever is listed.

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact

5. Say Something to Everyone at Once

A short message at the top of every Home page, with a link if you need one. It is the one place you can put something in front of the whole account.

Post a short message to the top of everyone's Home page to share news, a reminder, or a link with your whole team.

See Company Announcement

6. Name the Office and Keep It Current

The Location name labels your office everywhere in the account, including on reports that leave it. An office that moves or rebrands usually starts here.

Every Location has a name that identifies it across Pipeline — and you can update that name anytime.

See Location Info

7. Give Your Office a Person to Reply To

Task reminders and daily activity emails to your agents go out under this person's name. Set it and your agents reply to the right desk instead of to whoever happened to set the office up.

Give each Location a primary contact so agent replies to system emails reach the right person.

See Primary Location Contact

8. Open Another Office

A new branch, a team that needs its own roster, or a group that should see only its own files each gets its own Location. Add it before you add the people who belong in it.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location

9. Retire an Office You No Longer Run

Deactivating takes a Location off your list and keeps everything that happened in it. What is left is the offices and teams you are actively running.

Deactivate a Location you no longer use to keep your Locations list focused on the offices and teams you're actively running.

See Location Deactivation