Choose Between One Account, Separate Accounts, and an Enterprise

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Several offices, maybe several brands, and one question underneath all of it: how many Pipeline accounts should you actually have? The answer isn't about price — it's about how many company identities you need to show.

Introduction

Most people arrive at this expecting a cost comparison, and cost turns out to be the easy part. The thing that decides it is a limit worth knowing before you plan anything: **one Pipeline account carries exactly one company identity.** One company name, one brokerage license number, one logo, one set of CDA branding. Set once, applied everywhere in the account.

Locations are genuinely powerful. They separate users, transactions, permissions, and reporting, and they let one broker see the whole business while each office sees only its own. What they can't do is make two offices look like two *companies*. If your second office has a different name on the door or a different license behind it, no amount of Location configuration will show it.

That single fact sorts almost every version of this question, and the three structures below follow from it.

When to Use This

- You're bringing several offices into Pipeline and don't know whether they belong in one account.
- You're incorporating offices that each have their own logo and firm license number.
- You run two brokerages under one ownership, in one state or several.
- You've set up a separate LLC — a referral company, a property management arm — and want its financials kept apart.
- You already have several accounts and want one place to oversee them and one view of the billing.

Why This Beats Deciding on Price Alone

The instinct is to consolidate, because one plan sounds cheaper than three. Sometimes it is — plans are priced on transaction volume, not headcount, so extra people cost nothing and combining offices onto one plan can genuinely save money.

But a structure chosen purely on the monthly figure has a way of failing on a Tuesday six months later, when a CDA goes out to a title company under the wrong brokerage's name and license, and there's no setting that fixes it. Untangling one account into two afterward is a paid data move and a weekend. Deciding correctly at the start costs one conversation. Work out what has to be true first, then look at the bill.

1. Start With the Identity Question

Ask it plainly: *do these offices need to appear as different companies?* Different names on documents, different license numbers, different logos, checks payable to different entities.

If the answer is no — same brand, same license, several addresses — one account is your answer and step 2 is where to go. If the answer is yes for any of them, one account can't do it, and no configuration works around it.

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

See Company Name & License

> The same holds for your logo and for the company-wide settings that ride with it — custom fields, statuses, labels, standardized document names. They're set once for the account, not per office. Add your brokerage's logo so your Home page, coversheets, and commission documents all carry your brand. See Company Logo.

2. Choose One Account With Locations When the Offices Share a Business

Same name, same license, one company with several addresses — this is the structure to want. It's the least to run and usually the least to pay for.

Each Location gets its own users, transactions, and permissions, so a branch manager sees their office and a broker sees everything. You can report per office or company-wide, and it's one plan, one bill, and one login for anyone who works across offices.

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

See Adding a Location

> One reporting limit to know before you rely on it: not every report can be narrowed to a subset of Locations. Most financial reports run per Location, but some — the Commission Summary among them — are company-wide only. If per-office isolation of a particular report is essential to you, check that report before you commit.

3. Choose Separate Accounts When the Offices Are Separate Companies

Different names, different licenses, or genuinely independent operations — each company gets its own account. Everything is isolated: its own company name and logo, its own users, its own settings, its own reports, its own bill.

Understand what that isolation costs, because it's absolute. The accounts can't see each other. There's no cross-account report, no shared history, no way for one login to reach both. That's the point of the structure — but it's a real constraint on the day somebody wants a number that spans both companies.

Set up Commission & CDA Settings for each of your offices to decide who gets paid directly, whose signature signs the CDA, and what instructions your title company reads.

See Commission & CDA Settings

> Working out whether it's one plan or two for a new office specifically? Open a New Office — New Location or New Account? works the same choice from the billing side.

4. Add an Enterprise When Several Accounts Need Central Oversight

This is the third structure, and it's the one most people don't know exists: separate accounts, each with its own identity, tied together so the people who run the whole business can reach every one of them from a single sign-in.

It's the fit for a group of brokerages under common ownership, a franchise network, or a company whose offices are separate legal entities. Each account keeps its own name, license, logo, users, and settings — nothing is merged — and an Enterprise Admin gets across all of them.

One company, several Paperless Pipeline accounts. An Enterprise ties them together so the people who run the whole business can reach every account from one portal.

See Enterprise

Billing is the part worth understanding before you assume anything. The portal itself doesn't add a charge, and each account still carries its own Transaction Plan and its own monthly bill — an Enterprise gives you one place to manage those cards and one combined view of them, not one invoice that replaces them.

In an Enterprise, billing runs from one place. The Enterprise Admin controls the card on file for every member account, and can hand that control to a master admin whenever an office would rather manage its own.

See Billing Control

5. Plan for the People Who Work Across Offices

Whichever way you go with separate accounts, this is the practical detail that surprises everyone in week one: a Pipeline email address belongs to one profile per account. Your operations manager who needs to be in three accounts needs three profiles, each under a different address.

Email aliases are the usual answer — most mail systems let one inbox receive several addresses — so they still work from one place, they just sign in as the right person for the right company.

> Someone already juggling logins across two brokerages? Manage Your Pipeline Login Across Brokerages covers living with it day to day.

6. Talk It Through Before You Commit

The questions that settle this are quick, and they're worth answering out loud with us rather than guessing: do all the offices trade under one name and one license? Does each office have its own admin and agents, or do people work across them? Does anyone need a number that spans the whole group?

Say what you're building and we'll tell you which of the three fits — and if it's Enterprise, what setting it up involves. It's a far shorter conversation than the one about moving data between accounts later.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help