Company Name & License

Last Modified on 11/10/2026 12:22 pm EST

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

Introduction

Your brokerage's name and licence number turn up in more places than most people expect. They head the documents Pipeline produces, they identify the account to anyone you send something to, and they're what a compliance reviewer looks for first when a file gets pulled.

Both live in *Company Settings*, and they're set once when the account is created. That's usually the last anyone thinks about them, which is fine until something changes: a rebrand, a merger, a licence renewal under a new entity, or a broker of record moving on. Because these two details flow outward rather than sitting in one screen, correcting them in one place is the whole job.

Anything leaving Pipeline carries the right brokerage on it once these two are right. If yours has changed, updating it takes a minute and nothing else needs revisiting.

How It Works

These two fields live at the top of Company Settings, in the Global Settings section.

Company Name

Your company name is the brokerage or business that owns the transactions in your account. It appears on transaction coversheets and, if you generate them, on Compensation Disbursement Authorizations. A solo transaction coordinator can use their office's name or their own TC business name here.

Brokerage License

This is your brokerage's license number. It's stored with your account so it's on record alongside your company name.

Who Can Change These

Setting the company name and license number is a master admin task, since both apply to the whole account.

Set Your Company Name and License Number

Update both fields from Company Settings.

Who Can Do This: Master admins.

To set your company name and license number:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. In the **Global Settings** section at the top, enter your **Company Name**.
3. Enter your **Brokerage License #**.
4. Click [Save Settings].

Your updated company name flows through to new coversheets and commission documents right away.

Frequently Asked Questions

Where does my company name appear?

On transaction coversheets, and on Compensation Disbursement Authorizations if you generate them. It's the name that represents the business working the transactions in your account.

I'm a solo transaction coordinator — what should I use as the company name?

Either your office's name or your own TC business name. Use your office's name if you work for a single brokerage, or your own business name (for example, "Your Name Transaction Services") if you'd rather brand it that way.

We rebranded — where else do I update the name?

A few places beyond Company Settings. Also review your Location names and their contact info, your Commission and CDA settings under Manage Locations, and your company logo. Users who set a custom email signature should update it from their profile too.

Can I autofill an agent's license number into emails?

Not today. The Brokerage License # here is your brokerage's number; there's no autofill tag for an individual agent's license number. If that would help, tell us — it's a request we're tracking.

Who can change the company name and license number?

Master admins. Both fields apply to the whole account, so they're set at the company level.