

Adding a Location FAQ

Last Modified on 09/04/2026 11:10 am EDT

Adding a Location takes just a name from the Manage Locations page. Answers to the common questions about adding Locations and moving agents and transactions into them.

Who can add a Location?

A Master Admin, or an admin with the "Create users and locations" permission. Master Admins can always add Locations; other admins need that admin-level permission granted to them.

How do I move existing agents into a new Location?

Change their Primary Location on the Manage Users page. Open Manage Users, click the agent's name, choose the new Location from the Primary Location dropdown, and click [Update User]. You'll need the "Create users and locations" permission in that Location first.

Does moving an agent to a new Location move their existing transactions too?

No — it updates the agent's profile only. Existing transactions keep the Location they were created under. A Master Admin can change a transaction's Location from [Edit Transaction].

Why can't I manage agents in the Location I just added?

Permissions are location-specific. You need the "Create users and locations" permission granted in that Location by your Master Admin before you can add or move agents there.

Learn More

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

See [Adding a Location](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
