Adding a Location

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

Introduction

You're opening a second office, or a group inside your company needs its files kept apart from everyone else's. Either way the move is the same: you add a Location for that group, and the people and the work you put inside it stay together.

A Location doesn't have to be a building. Brokerages use them for branch offices, but they work just as well for a commercial team, a franchise, or a set of confidential files only a few people should reach. They stretch that far because permissions in Pipeline are granted location by location, so putting a group in its own Location is how you decide what that group can see. It all still sits under one account, so adding a Location doesn't split your company in two.

A new Location starts empty and grows into whatever you need: add users to it, move transactions into it, and let each office run its own patch without seeing the whole company's files. Nothing about it is locked in either. A Location can be renamed later without disturbing the work inside, so you don't have to settle on the perfect name before you start.

How It Works

You create Locations from the Manage Locations page — give the new one a name and its contact information, and it's ready to use.

What a Location Represents

Locations commonly represent the different offices of an agency or brokerage, but they can just as easily stand for a team or any group you want to keep separate — a home for confidential documents, a special team structure, and so on.

Where Locations Live

Every Location is added and managed from the Manage Locations page in your admin settings.

What You'll Enter

A Location takes a name and its contact information — the address, phone, fax, and email for that office. Every field is described below, under *Add a Location*. Once added, the Location appears in your Locations list, ready to receive users and transactions.

Add a Location

> Create a new Location from the Manage Locations page — give it a name and its contact information.

Who Can Do This: Master Admin and admins with the "Create users and locations" permission.

To add a Location:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. From the left menu, click [Manage Locations], then click [Add Location].

2. Add the information you have available for the Location (outlined below), then click [Add Location] to save.

Location Name

Enter the **Location Name** — what your team sees when they pick this Location for a transaction or a user, so make it clear enough to tell your offices and teams apart.

Location Contact Info

Enter the Location's **Address**, **Phone**, **Fax**, and **Email**. This is the office's own contact information, and it's what appears on the coversheets for transactions in this Location — so it's worth getting right up front.

Your new Location appears in the Locations list, ready for you to add users and move transactions into it. To change any of this later, see Location Info.

Decide Who Can See Inside It

A new Location is a boundary before it's an office. Nobody sees what's in it until you say so, and that includes the admins who already see everything in your other locations — access doesn't carry across on its own.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

Adding a Location FAQ

Adding a Location takes a name and its contact information, but moving agents and transactions into it takes the right permission and a couple of extra steps. Answers to the common questions about who can add Locations, moving agents in, and managing the new Location. See Adding a Location FAQ.