Location Info

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

Introduction

Offices rebrand, teams get renamed, and a Location you set up in a hurry ends up carrying a name nobody uses any more. A Location's name lives in one place in Pipeline, so bringing it current is one edit rather than a hunt through the account.

Locations most often stand for the different offices of a brokerage, though plenty of accounts use them for something else: a commercial team, a franchise, or a group whose files should stay apart from the rest. Whatever a Location represents in your company, its name is how everyone else recognizes it. It's what your staff picks from when they file a transaction, and it's what sits beside a user on their profile, which is why an out-of-date name costs more than it looks like it should.

Adding a Location and renaming one both happen on the same page, so there's one path to learn instead of two. And a rename is a low-stakes edit, which is worth knowing if you've been living with an awkward name because changing it felt risky. What you call a Location today doesn't touch the deals that closed under what you called it last year.

How It Works

You add, rename, and retire every Location from the Manage Locations page — and its name is the piece of information it carries.

Find the Manage Locations Page

Click the [Gear] in the upper-right corner, then [Admin / Settings]. From the left menu, click [Manage Locations]. You'll find every Location you've added here, each with a gear menu for editing and deactivating it.

Keep the Name Clear and Current

The name is what everyone sees when they pick a Location for a transaction or a user, so keeping it clear and current helps the whole team choose the right one.

Renaming Is Safe for the Work Inside

Editing a Location's name changes the label only. The users, transactions, and documents already in that Location stay exactly where they are.

Who Can Manage Locations

Master Admin and admins with the "Create users and locations (admin-level permission)" can add, edit, and deactivate Locations. Because permissions are granted location by location, an admin needs this permission in a Location to manage it.

Beyond the Name

A Location can also have a primary contact — the admin that Pipeline's system emails come from, giving agents a clear person to reply to. See Primary Location Contact.

Add a Location

Create a new Location from the Manage Locations page by giving it a name. Every field is described in Adding a Location.

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 in Adding a Location — then click [Add Location] to save.

Your new Location appears in the Locations list, ready for you to add users and move transactions into it.

Rename a Location

Update a Location's name from the Manage Locations page using its gear menu.

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

To rename a Location:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the left menu, click [Manage Locations].
3. To the right of the Location, click the gear and select [Edit Location].
4. Enter the new Location name.
5. Click [Save].

The updated name appears in your Locations list right away, and everywhere the Location is shown.

Frequently Asked Questions

Can I rename a Location without losing the work inside it?

Yes. Renaming changes the label only — the users, transactions, and documents in that Location stay right where they are.

Will renaming a Location change the numbers on its transactions?

No — a rename updates the Location's name, not its data. The figures recorded on each transaction are stored on the transaction itself and aren't touched when you rename the Location around them.

Where do I change a Location's name?

On the Manage Locations page. Click the gear to the right of the Location, choose [Edit Location], enter the new name, and click [Save].