Primary Location Contact

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Give each Location a primary contact so agent replies to system emails reach the right person.

Introduction

Most people arrive at this setting the same way. Agents reply to the daily task emails Pipeline sends them, the replies land with someone who has nothing to do with those tasks, and nobody remembers choosing that person. That's a Location's primary contact doing exactly what it's built to do.

A primary contact is one admin attached to one Location, and that person is the reply-to on the automatic mail Pipeline sends to the people in that Location. The setting exists because agents reply to those emails. Somebody has to be on the other end of the reply, and in an account with several offices the right somebody is usually the admin down the hall rather than whoever runs the whole company.

Set deliberately, it gives your agents an obvious person to write back to and keeps their questions landing where someone can act on them. If you're here because agent replies keep landing in your inbox and you'd rather they didn't, that's a checkbox on a user's profile rather than something wired into the account. Changing it moves where replies go and nothing else, so nobody loses access or permissions over it.

How It Works

You set the primary contact on a user's profile, and it decides who your agents reach when they reply for that Location.

What the Primary Contact Does

When a Location has a primary contact, that admin is the reply-to on the Location's system-generated emails — daily task reminders, expiration and closing notifications — so agents replying to those emails reach the right person.

One Contact per Location

Only one user holds it for a Location at a time. You can set a different primary contact for each Location, which lets a multi-office account route agent replies to the local admin.

If You Haven't Named One

When a Location has no primary contact, replies go to the Admin & Support Contact, or to the Master Admin if no Admin & Support Contact has been set.

Set a Location's Primary Contact

Set a user as a Location's primary contact from their profile on the Manage Users page.

Who Can Do This: Master Admin and admins who can manage users.

To set a Location's primary contact:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. From the left menu, click [Manage Users].
3. Click the user's name.
4. Check "Make this user the primary contact for this location."
5. Click [Update User].

Agent replies to that Location's system emails now go to this admin.

If You Only Have One Office

With a single Location there's nothing to route, so the account-wide contact named above is the setting that matters. It's set in Company Settings rather than on a person's profile, and the fields are plain text — a role name or a shared inbox works as well as a person's.

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact

Frequently Asked Questions

Which emails does the primary contact apply to?

System-generated ones. Daily task reminders and expiration and closing notifications for that Location carry its primary contact as the reply-to, so agent replies land with the right person.

Who receives agent replies if I haven't set a primary contact?

The Admin & Support Contact. If no Admin & Support Contact is set either, replies go to the Master Admin.

Can each Location have its own primary contact?

Yes. Set a different primary contact for each Location so a multi-office account routes agent replies to the local admin.

Our primary contact changed and we don't know how — what happened?

A Location's primary contact only changes when someone checks that box on a user's profile. Open Manage Users and click through your admins to see whose profile currently has "Make this user the primary contact for this location" checked.

How do I set a Location's primary contact?

From the Manage Users page. Open the user's profile, check "Make this user the primary contact for this location," and click [Update User].