

Primary Location Contact

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Give each Location a primary contact so agents know who to reply to, and system emails come from the right person.

Introduction

Most people arrive at this setting the same way. The daily task emails going out to their agents are signed by someone who has nothing to do with those tasks, agents keep replying to that person, and nobody remembers choosing them. 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's name is what Pipeline puts on the automatic mail it 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 the mail is going out under your name and you'd rather it didn't, that's a checkbox on a user's profile rather than something wired into the account. Changing it moves who appears as the sender 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 shapes who your agents hear from and reply to for that Location.

What the Primary Contact Does

When a Location has a primary contact, Pipeline sends its system-generated emails — daily task reminders, expiration and closing notifications — from that admin, so agents replying to those emails reach the right person.

One Contact per Location

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, Pipeline sends its notification emails from the Admin/Support Contact — or from 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 administrator for this location."
5. Click [Update User].

System emails for that Location now come from this admin, giving agents the most appropriate person to reply to.

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](#)

Primary Location Contact FAQ

A Location's primary contact is the admin that system emails come from, and each Location can have its own. Answers to the common questions about who receives agent replies, which emails are affected, and how the contact gets set. See [Primary Location Contact FAQ](#).
