Set Up a New Office Location End to End

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Adding the Location takes a minute. Everything that doesn't come with it is the actual job — and knowing which settings are already account-wide saves you copying the ones you never had to.

Introduction

You've opened a second office, or split a growing one in two, and Pipeline needs to know. Creating the Location is the easy part; the question people arrive with is the one after it: *can I just copy everything over from the office that already works?*

Partly. Some settings live at the account level and are already waiting for you in the new Location, no copying required. Others live per Location and have to be built or copied by hand. A new Location inherits nothing from an old one, so the work is knowing which list each setting is on.

The short version: your document names, statuses, and labels are already there. Your commission settings, checklists, and permissions are not.

When to Use This

- You're opening a second office and want it configured like the first.
- You created a Location and your agents can't see it or add transactions to it.
- Commission entry isn't available on the new Location's transactions.
- Documents from the new office keep landing in the wrong Location.
- You want to know what you actually have to copy before you start clicking.

Why This Isn't a Clone Button

Every office arrives expecting one, so it's worth saying plainly: there's no copy-settings-from-another-Location action, and the pieces that matter most — permissions and commission settings — are exactly the pieces you'd least want copied blindly. A permission set cloned from your busiest office onto a brand-new one is how a junior admin ends up with View All across a book of business nobody meant to open.

What makes this manageable is that the list is shorter than it looks. Three settings need real work, two need a moment, and a whole category of things people plan to copy turns out to be account-wide already.

1. Add the Location

Start in your own account — this isn't something we can create for you. Give it the office's name and its street address, because that address is what appears in the upper-right of coversheets for the Location's transactions, which is how a branch gets its own address on paperwork.

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

See Adding a Location

> Nothing to wait for. A new Location is live immediately — it just won't appear to anyone until they have permissions in it, which is step 4 and the reason most "my new Location isn't showing up" questions resolve themselves.

2. Copy Commission & CDA Settings by Hand

Running the Commission Module? This is the setting that stops the new office cold: commission entry isn't available on a Location until you configure its Commission & CDA Settings, and they don't duplicate from anywhere.

Open **Admin / Settings**, then **Manage Locations**, click the gear beside a Location and choose **Commission & CDA Settings**. The practical way to do this is two browser tabs — the working office in one, the new Location in the other — copying field by field and saving. Tedious for five minutes, and then it's done.

> Do this before anyone works a deal in the new office. Manage Commissions won't appear on its transactions until you save the settings, and the first person to hit that will assume something's broken.

3. Bring the Checklist Templates Across

You assign checklist templates to Locations, so a template built for your first office doesn't apply itself to the second. There are two ways across, and which one you want depends on whether both offices need it.

To reuse a template in the new Location:

1. Open the Checklist Templates area.
2. To use it in both offices, click the gear on the template and choose **Copy Template**, then assign the copy to the new Location.
3. To move it outright, open the template and change the Location it's assigned to.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

> Two offices in two states is the classic reason to keep separate copies rather than share one: each Location gets its own state's forms, and auto-apply rules put the right checklist on the right transaction without anyone choosing.

4. Set Permissions Person by Person

Permissions are held per user, per Location, and there is no bulk copy. Everyone who will work in the new office needs their boxes checked inside it — including the admins who already have everything in the office next door.

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

See User Permissions

> Primary Location and permissions are independent. A person can hold permissions in the new Location while their Primary Location stays where it was, which is how a floating admin covers both offices. The *Active Users* count on Manage Locations follows Primary Location, not permissions — so a Location showing zero users can still have a dozen people working in it.

> Setting up a lot of people the same way? Open the reference person's profile in one tab and the new person's in another and work across. If it's a whole roster, our Tech Team can apply permissions by role across the Location instead.

5. Name the Primary Location Contact

Quick, and worth not skipping: each Location has a primary contact, and that setting decides whose name Pipeline's system emails come from for that office. Leave it and your new branch's agents get mail signed by whoever runs a different building.

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

See Primary Location Contact

6. Hand Out the Location's Maildrop Address

Each Location has its own maildrop address, and using it is what keeps the new office's paperwork out of the old office's queue. Give it to the branch — on the scanner, in the agents' onboarding note — instead of the generic account address.

Email your documents to a maildrop address and Pipeline pulls the attachments in — no logging in, no uploading.

See Maildrop

> **What you don't have to copy.** Standardized document names, transaction statuses, transaction labels, doc labels, custom fields, and default field values are all account-wide — they're already in the new Location, and there's nothing to duplicate. Your company logo and welcome message are account-wide too, which is the flip side: a Location can't carry its own branding.