Set Up a Team Inside an Office

Last Modified on 09/04/2026 11:10 am EDT

Pipeline has no separate team object — it has Locations, and a Location is exactly the right shape for a team. Give the team one, and the leader sees every file on it without being written onto a single transaction.

Introduction

A team forms inside your office. One agent brings on two more, a listing team splits off, a group of new agents needs its own supervision. Now somebody has to see all of that group's work, and only that group's work. There's no *Teams* page to go build it on.

There doesn't need to be. A Location in Pipeline is a permission boundary and a reporting boundary, and both of those are what a team actually needs. It doesn't have to be a physical office, and plenty of accounts run Locations that are teams, departments, or a single agent's book of business. Give the team one, put its people and its deals inside, and the leader's access stops at the edge automatically.

Before you build one, though, it's worth checking whether you need it. A Location is real structure with real consequences, and some of what looks like a team problem is a task problem wearing a costume.

When to Use This

- A team leader wants to see all of their team's transactions without being added as a co-lister on each one.
- You want to group agents for reporting without cutting them out of the brokerage-wide numbers.
- Two teams work in the same office and shouldn't see each other's files.
- A team lead needs to comment on their agents' documents and can't.
- You want to run one office's numbers and one team's numbers side by side.

Why This Beats Adding the Leader to Every File

The obvious move is to put the team leader on each transaction as a co-lister or an assistant. It works — for a week. Then the team writes ten more deals, and every one of them needs remembering, and the first one somebody forgets is the one the leader needed. Worse, adding them as an agent can put them into the commission math on files they didn't sell.

A Location inverts the work. Grant it once and every future transaction in that Location is visible the moment it's created, with nobody remembering anything. The access is a property of the group rather than a chore attached to each deal — which is why this is the answer support gives whenever the file count is going to keep growing.

1. Check Whether You Actually Need a Location

Ask what the team is really short of. If the answer is *each person should only see the tasks that belong to them*, that's not a Location — that's task visibility, and building an office structure to get it is a lot of ceremony for a setting.

Decide who sees each task, so every person gets just the tasks that belong to them.

See Task Visibility

Reach for a Location when the team needs its own *files*: a leader who must open every deal, a group whose transactions shouldn't be visible to the rest of the office, or numbers you want to pull separately.

2. Add the Team's Location

Name it for the team, not for a building — *Kelly Team* reads perfectly well next to *Main Street Office* in every dropdown it appears in.

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

See Adding a Location

> Teams don't nest. Pipeline has no team-inside-a-team, so a sub-team of a sub-team needs its own Location alongside the others rather than underneath one. If your structure is deep, flatten it: one Location per group that needs its own visibility.

3. Put the Team's People In It

Set each team member's Primary Location to the new Location, then grant them the permissions they need inside it. Permissions are granted per Location, so nothing carries over from wherever they were before — expand the new Location on their profile and check the boxes there.

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

See User Permissions

> Primary Location and permissions are separate ideas. Primary Location is where a person sits by default; permissions are what they can do, Location by Location. An agent can hold permissions in any Location regardless of which one is their primary — which is how a floating admin covers three teams at once.

4. Give the Leader View All in the Team Location Only

This is the step the whole setup exists for. On the leader's profile, expand the team's Location and grant **View all transactions for this location (admin-level permission)** — and grant it there and nowhere else.

They now open every transaction in the team's Location, including deals they were never added to, and they can leave comments on their agents' documents. Outside that Location they see exactly what a regular agent sees. It's the same permission a branch manager gets, pointed at a team instead of a building.

Your branch manager runs one office, and their access should stop at its door. Pipeline scopes every permission by location, so it can.

See Give a Branch Manager Access to Only Their Office

> Layering works. Give your office admin View All in both the main Location and the team Location, and the team lead View All in the team Location alone — the admin sees everything, the lead sees their team, and neither setting fights the other.

5. Move the Team's Existing Deals Across

Moving a person doesn't move their history. Transactions stay in the Location they were created in until somebody changes them, so a team built today starts empty even if its agents have twenty open files.

Open each transaction, click **Edit Transaction**, and pick the new Location. You'll need permission in more than one Location for the dropdown to offer a choice.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

> Changing a created transaction's Location is a master admin action, so if your team lead is setting this up themselves they'll find the field won't move. Have a master admin do the moves. If there are dozens of them, write to help@paperlesspipeline.com — our Tech Team can move a batch rather than you clicking through them one at a time.

6. Run the Team's Numbers and the Company's

The worry offices raise here is that carving out a team carves it out of the brokerage report. It doesn't. Company-wide reports include every Location, the new one included — the team's production still counts toward the whole. Filtering by Location is what gets you the team on its own.

So you get both readings from the same setup: the office total, and the team inside it. That's the part that makes a Location worth building where a workaround wouldn't be.

> Locations do more than scope people. A Location gets its own maildrop address, its own checklist templates, and — with the Commission Module — its own commission and CDA settings, so a team can run its own split structure without affecting anyone else's.