Add Users Now and Send Their Logins Later

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Building the roster and releasing the logins are two separate moments, and one checkbox keeps them apart. Leave it unchecked and nobody hears from Pipeline until you're ready for them to.

Introduction

You're rolling Pipeline out to an office, and the order matters. Profiles have to exist before you can set permissions, assign transactions, or test anything — but the moment an agent gets a login they'll use it, and an agent who logs in before training is an agent with questions you weren't ready for.

Pipeline separates the two on purpose. Creating a user is silent unless you ask it not to be. The Welcome Email is what carries the login details, and Pipeline generates the password and sends it with that message. Until it goes out, the profile exists and nobody knows.

When you are ready, you can release credentials one person at a time as they finish training, or fire them at everyone still waiting in a single click.

When to Use This

- You're setting up an office before a training day and don't want agents logging in early.
- You want to add agents as they're hired and give them access on their start date.
- You need profiles in place to configure permissions or assign files before anyone has access.
- An agent never got their welcome email and you need to send it again.
- You want to see what your welcome email actually says before it reaches anybody.

1. Leave the Welcome Message Unchecked

On the Add User page there's a checkbox — **Send this user a welcome message**. Checked, the person gets their login details the moment you save. Unchecked, the profile is created and nothing is sent.

That's the whole mechanism. Add as many people as you like this way; none of them will hear a thing.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

Adding a whole roster rather than a handful? Send us the list and we'll load it for you, still without a word going out to anyone.

Sixty agents, one spreadsheet. Send us the list and your whole roster lands in the account — quietly, on your schedule, with nobody hearing from Pipeline until you say so.

See Bulk-Onboard a Roster of Agents

2. Set Permissions While Nobody's Waiting

This is the reason the delay is worth having. With profiles created and no credentials out, you can work through everyone's permissions Location by Location, move people between Locations, and fix what you got wrong — with no one logged in behind you wondering why the screen changed.

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

See User Permissions

3. Write the Welcome Message Once

The text of the welcome message is account-wide. It's set in your Company Settings, and it's the same message for every Location, every role, and every sender — there's no per-office version and no per-team version.

So write it generically enough to fit everyone who'll ever receive it. You can also edit it on the Add User page and tick *Save this as the default message* to keep the change, which is the easiest place to work on the wording.

Send new users their login details the moment you're ready — and not a second before.

See Welcome Emails

> Want to read the real thing exactly as an agent receives it? There's no self-send or preview copy. Create a temporary user on an address you control, send it a welcome, read it, then deactivate that user.

4. Log In as the Right Sender

Worth a moment if the sender matters to you: a Welcome Email arrives from whichever admin is logged in when it's sent. Send them from your own login and they come from you; have your onboarding coordinator send them and they come from her.

The message text doesn't change with the sender — only the name it arrives under. If a particular team or brand should appear to be the one welcoming people, log in as that admin before you send.

5. Send the Logins When You're Ready

Now release them. On the Manage Users page you can send a Welcome Email to a single person as they finish training, or use **Send Welcomes** at the top of the page to send to every user who hasn't logged in yet — which is exactly the group you built in step 1.

Each message carries a freshly generated password, and the agent sets their own on first login. Nobody, including us, can look up an existing password, so re-sending a welcome is also the answer for the agent who never received theirs.

> Send Welcomes skips anyone who has already logged in, so running it after a partial rollout doesn't disturb the people already working. It also issues a new password to everyone it does reach — so if an agent is mid-setup, send theirs individually instead.

There's no permanent suppression. If someone should never receive Pipeline mail — an outside coordinator, a system address — leaving the welcome unsent works for as long as nobody clicks Send Welcomes, but it isn't a setting and it isn't guaranteed. To keep someone on the roster who shouldn't sign in or get Pipeline mail, see Add Agents to Pipeline Without Giving Them Access.