Adding a User

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

Introduction

A new agent starts Monday and can't see a single file until somebody adds them. Nobody signs themselves up for Pipeline. Bringing people in is an admin job, which means a new hire is waiting on you rather than on an email they haven't received yet.

Everyone who needs their own way into your company's account gets added the same way: agents, transaction coordinators, office staff, admins. What separates one from another isn't the label, it's permissions, and Pipeline grants those location by location. Two people sitting in the same office can end up with very different views of it. The address you give somebody is the login itself, so every profile in the account needs an address of its own.

Add someone and they appear on your user list, able to sign in with what you set. The payoff for doing it person by person is precision — you decide what each new arrival can reach before they ever log in. And if the account stops you because the email address is already in use, that isn't a mistake on your end. It usually means the person still has a live profile at the brokerage they came from, which is fixable rather than a dead end.

How It Works

Adding a user takes a name, a login email, and a primary location — then you decide what they can do and whether to welcome them right away.

The Manage Users Page

Everything to do with users lives under [Manage Users] in your admin settings. It's where you add new people, edit existing ones, and set what each person can access.

What You'll Set for Each User

A user takes a first and last name, the email address they'll log in with, and a primary location — plus their permissions and whether to send the welcome email now. Pipeline generates their password and sends it with that email. Every field is described below, under *Add a User*.

Welcoming Them In

As you add a user, you choose whether to send a welcome email with their login details right away, or hold off and send it later when you're ready. See Welcome Emails.

Add a User

Add a new user from the Manage Users page in your admin settings.

Who Can Do This: Admins with the "Create users and locations" permission, and master admins.

To add a user:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Click [Manage Users], then [Add User].
2. Complete the form for the new user (outlined below), then click [Add User] to save.

First & Last Name

Enter the user's **First Name** and **Last Name**. This is how they'll appear throughout Pipeline.

Email Address

Enter the **Email Address** the user will log in with.

Primary Location

Select the user's **Primary Location**, if your account has more than one. It's their home base — you'll still be able to give them permissions for other locations.

Welcome Message

Decide whether the new user should receive a welcome email containing their login info. To send one, leave the **welcome message** checkbox checked, then confirm or edit the subject and message. SeeWelcome Emails.

Save This as the Default Message

Check [Save this as the default message] if you'd like the subject and message you just wrote to be used for future welcome messages.

User Permissions

In the **Permissions** section, expand a location if necessary and check the boxes next to the permissions you want to grant. Permissions are granted by location, so specify them separately for each one. To learn what a permission does, hover over it and read the help text to the right. See User Permissions.

The new user appears on your Manage Users list. They can sign in once their welcome email arrives, because it carries the password Pipeline generated, and Pipeline asks them to set their own the first time they log in. To change any of their details later, see User Profile.

Frequently Asked Questions

Who can add users?

Admins with the "Create users and locations" permission, plus master admins. If you can't get to [Manage Users] or [Add User], your admin hasn't granted you that permission yet.

Is there a limit to how many users I can add?

No — Pipeline doesn't charge per user. Add as many agents and staff as your team needs; your plan is based on transactions, not the number of people who log in.

Do I have to send the welcome email right away?

No. Uncheck the welcome-message box while you're adding the user, and send it later from the Manage Users page when you're ready. See Welcome Emails.

Can I set a new user's password myself?

No. Pipeline generates the password and sends it only in the welcome email. If someone never received theirs, send a fresh welcome from Manage Users. See Welcome Emails.

I added a user, but they're not on my Manage Users page. Where are they?

Your list is probably filtered. If you've searched by role or name, click [View active users] to clear the search and show everyone. Also confirm you're looking at the location you added them to.

Can I add my whole roster at once instead of one at a time?

Yes. Put your agents in a spreadsheet and send it to us, and we'll load the roster for you. SeeAgent Roster Import.