Agent Roster Import

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

Onboard your whole team at once — send us your agent list and we'll load it for you.

Introduction

Bringing a whole brokerage onto Pipeline one person at a time is an afternoon you don't need to spend. If your agents are already on a list somewhere, send it over and we'll put them into the account for you.

There's no bulk-add button inside Pipeline, and a roster import is what stands in for one. You build the list in a spreadsheet, we do the loading, and everyone arrives as a real user profile rather than a placeholder to fix later. It's the same shape of work whether you're standing up a brand-new account or folding in the agents from an office you just picked up, and one file covers every office, however many you run.

The result is a whole team in place before a single agent hears a word about it, which matters more than it sounds when you're timing a rollout around a go-live date. You also don't have to guess at the format. Ask us for the layout we work from and start there, rather than building the same spreadsheet twice.

How It Works

A roster import is a quick handoff: you build the list, we do the upload.

What the Roster Needs

Your spreadsheet needs a separate column for each agent's first name, last name, primary email address, and role. You can also include optional details like phone number, license number, and office locations. If it helps to start from a ready-made layout, ask us and we'll share a template.

You Control the Welcome

Uploading the roster doesn't email your agents. No one gets a welcome until you send it, so you can set everything up quietly and invite people when you're ready. See Welcome Emails.

We Handle the Upload

Once we have your list, we load it into your account. You'll have every agent in place, ready for permissions and welcomes on your schedule.

Prepare and Send Your Roster

> Build your agent list in a spreadsheet and send it to us to import.

> **Who Can Do This**: Account admins and master admins.

To prepare and send your roster:

1. Create a spreadsheet with a column for each agent's first name, last name, primary email address, and role. Add optional columns like phone, license, and office locations if you have them.

2. Double-check that every agent has a unique email address, since each one becomes their login.

3. Send the completed spreadsheet to us at help@paperlesspipeline.com and let us know it's a roster to import.

4. We'll upload the roster and confirm when your agents are in place.

Your whole team lands on the Manage Users page, ready for you to set permissions and send welcomes whenever you choose.

Set What They Can Reach

An imported roster arrives as real profiles with nothing decided about access. That part stays with you, and it's set per person per location, so an account with several offices has a round of this to do before the welcomes go out.

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

See User Permissions

Agent Roster Import FAQ

A roster import lets us load your whole team at once from a spreadsheet. Answers to the common questions about required columns, welcome timing, and the template. See Agent Roster Import FAQ.

Ways to Use Agent Roster Import

See Agent Roster Import at work inside a bigger job:

- Bulk-Onboard a Roster of Agents