Bulk-Onboard a Roster of Agents

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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.

Introduction

Standing up a brokerage means getting everyone in. Typing them in one at a time works, and for five people it's the right call. For fifty, it's a week you don't have. Send us the list instead and we'll load it for you.

The import itself is the easy part. What makes the difference between a roster that lands cleanly and one that bounces back twice is what you do around it: your Locations existing before the list references them, your columns carrying everything you want loaded, and your permissions set before a single agent gets an email.

Nothing here is a race. An uploaded roster is silent. Agents don't hear from Pipeline until you send welcomes, so you can take the account apart and put it back together before anyone knows it exists.

When to Use This

- You're bringing a whole brokerage onto Pipeline and adding sixty agents by hand isn't happening.
- You're opening offices and need everyone in place before launch day.
- You already keep your agents' details — splits, start dates, license numbers — in a spreadsheet.
- You're folding a group of new agents into an account you already run.
- You want everything set up quietly, with nobody emailed until you're ready.

> If the office you're bringing in *already uses Pipeline*, this isn't the article — that's a different mechanic. Their account can be merged into yours, or a single Location moved across, by our team for a fee, with authorization from the master admins on both accounts. See Location Transfer.

1. Set Up Your Locations First

Your roster names the office each agent belongs to, and those names have to match Locations that already exist in the account. Building them first is what keeps your import from coming back with corrections — mismatched Location names are one of the two errors that reliably stall a roster.

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

See Adding a Location

2. Build the Roster Spreadsheet

Now the list itself: one row per person, one column per detail. If you'd rather not guess at the layout, ask us and we'll send you a template that already lines up with what we need.

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

See Agent Roster Import

> Every agent needs a unique email address, because that address becomes their login. Duplicates are the other error that stalls an import — and if someone on your list already has a Pipeline profile at another brokerage, that address won't be free until it's released. See Can't Add a User? Email Already Exists.

3. Add the Commission and Profile Columns You Want Loaded

The roster isn't limited to names and emails. If you already hold the rest of an agent's details, put them in the spreadsheet and we'll load them at the same time — which saves you opening fifty profiles later to type in what you already had.

Columns we can import beyond the basics:

1. **More Info** — the free-text details you keep on a profile.
2. **Commission Split %** — each agent's current split.
3. **Next Commission Split Threshold** — where their split changes.
4. **Commission Notes** — anything your accounting needs alongside the split.
5. **Payable LLC or Corp** — who the commission is actually paid to.
6. **Start date** — the date they joined.

Optional details like phone number, license number, and office locations belong here too. Anything you leave out is still editable per profile afterward — it's just slower.

> This is for loading *new* people. Bulk-changing details on profiles that already exist — updating everyone's split, moving people between Locations — is a separate, paid manual job rather than a second roster import. Email us and we'll walk you through it.

4. Send It and Plan Around the Upload Window

Email the finished spreadsheet to us at help@paperlesspipeline.com and tell us it's a roster to import. An admin on the account needs to be the one who sends it — we're loading people into your brokerage, so the request has to come from someone who runs it.

Then plan around it, because a roster upload is scheduled work rather than a button. We run them around weekends and outside peak hours to keep them clear of your working day. If you need it in place by a particular date, say so when you send it and we'll accommodate it where we can — just don't build a launch day around a date we haven't confirmed.

Watch your inbox while it's with us. If a row doesn't sit right — a duplicate email, a Location name that doesn't match — we'll come back to you to correct it, and the roster waits until we hear back. Answering that email quickly is the single biggest thing in your control.

5. Set Permissions Before Anyone Hears From Pipeline

Your agents land on the Manage Users page and the account goes quiet — nobody has been emailed, nobody can log in yet. That gap is the point: it's when you decide what each person can actually do.

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

See User Permissions

6. Send the Welcome Emails When You're Ready

Uploading a roster doesn't email anyone. Your agents hear from Pipeline the moment you send welcomes and not a second earlier, so the launch is yours to time — all at once on training day, or one office at a time as each is ready.

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

See Welcome Emails

> Someone always arrives after the roster does. Adding them one at a time on the Manage Users page is the same account, the same result — a roster import is just the fast path for a group. See Adding a User.