# Cover Someone's Files While They're Out

Last Modified on 11/10/2026 12:23 pm EST

Somebody's out for two weeks and their files still need working. Every part of covering for them is a grant you can make today and take back the day they're back — none of it requires handing over a password.

## Introduction

Vacation, maternity leave, a stretch of medical time. The office's instinct is the simplest thing in the world: give the covering person the absent person's login and let them get on with it. It works, and it costs you the one thing Pipeline is quietly doing for you the whole time: a record of who did what.

Everything in your account is attributed to the profile that did it. Two people behind one profile means a history that reads like one person, which is exactly the record you don't want when a file comes back into question a year later. There's also no way to attach a second person to a profile even if you wanted to; Pipeline doesn't link them.

What it does have is a set of temporary grants, each aimed at a different shape of coverage. Pick the one that matches how much the covering person needs to reach, and put a note in your calendar to undo it.

## When to Use This

- An agent is on leave and someone needs to keep their transactions moving.
- You're going on vacation and want someone able to handle master admin work while you're gone.
- Your admin is out and role-based @mentions are piling up with nobody reading them.
- A colleague needs to send from your message templates for a couple of weeks.
- Someone's been covering with a borrowed login and you'd rather it stopped.

## 1. Give Them Their Own Access

Start from the principle and the rest follows: the covering person works under their own profile. If they're not in Pipeline yet, add them — a profile costs nothing and it keeps the record honest.

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

Heading out and worried you'll be asked to change something from the road? You don't need to hand anything over for that — Pipeline runs in a phone browser, and admin settings work there like anywhere else.

Open Pipeline in your phone's browser, and add an icon to your home screen to get back in with one tap.

See Pipeline on Mobile

## 2. Grant the Permissions, Then Take Them Back

When the coverage is broad — a whole Location's worth of files while the admin who runs it is away — permissions are the tool. Open the covering person's profile, expand the Location, check what they need for the fortnight, and save. On their colleague's first day back, uncheck the same boxes.

Because permissions are held per Location, the coverage lands exactly where you point it and nowhere else.

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

See User Permissions

> Master admin can be covered the same way, on a date you name — granted while you're away and removed when you're back. It's the highest level in the account, so give it to one person, for a stated window, and treat the removal as part of your return rather than something to get to eventually.
>
> The master admin sits at the top of your account — full access to every location, every transaction, and the settings no one else can touch.
>
> See Master Admin

## 3. For a Few Files, Use Assistant Access Instead

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants

> This is per transaction, so it's the right choice for a short list and the wrong one for a long one. If you're adding somebody to twenty files, grant a Location permission instead — and anything created while they're away won't be covered by this at all.

## 4. Keep Role-Based @Mentions Landing

Here's the one that catches people. If your office assigns tasks by @mentioning a role rather than a person, those mentions follow the role — and if the only profile holding that role is on a beach, the tasks pile up unread. A person can only hold one role, so you can't add the absent person's role to the covering person.

The way through is a temporary profile. Create a second user for the covering person on an email alias of their own address — the `+` form most mail providers support works well — and give that profile the **same Role** as the person who's away. Role-based mentions now reach both profiles, and both land in the same real inbox.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

> An alias counts as a different address, which is the whole trick — Pipeline identifies people by login email and won't accept the same one twice. Deactivate the temporary profile when the coverage ends; it stops appearing in dropdowns and its history stays intact.

## 5. Share the Templates Before They Go

Small thing, easily forgotten on the way out the door: message templates belong to the person who wrote them. A covering admin can't reach a colleague's templates, which means re-typing the messages that office sends most.

Have the person going out share theirs from Manage Templates — with everyone, or with other admins — before they leave. They keep ownership and editing rights, everyone else can send from them, and the share comes off on their return.

One admin can write a message once and hand it to the whole office. That's what sharing a message template does.

See Shared Templates

> Don't ask us to transfer templates for temporary cover. A transfer is a permanent handover of ownership — the original author loses access to their own templates — and there's no putting it back. Sharing is the reversible version, and it's the one this situation wants.

## 6. Undo It All on Their Return

Temporary access stops being temporary the moment nobody closes it out. Run the same list backwards on the day they're back: uncheck the permissions, remove the assistant from those transactions, unshare the templates, and deactivate any temporary profile you created.

If we granted master admin for the window, write in and ask us to remove it — we don't take it back on a timer.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation