Location Membership

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Everyone on your account has one Primary Location, the office they're based in. It decides where they're listed, not what they can reach.

Introduction

You open a second office and the first question is how to get people into it. Or an agent splits her week between two branches and wants to show up under both, and the field only takes one answer.

Primary Location is a single line on somebody's profile that says where they work. What they can open, edit and review is a separate matter entirely, granted to them office by office in their permissions. Holding those two apart answers nearly every question in this area, because the field carries less weight than it looks like it should.

So an agent based in your Westside office can be assigned to a Downtown deal and work it normally, and an admin can hold the run of every office while being listed under one. Move somebody's Primary Location and their access is exactly what it was the day before.

How It Works

A profile carries one Primary Location. Permissions carry everything else.

One Person, One Primary Location

The field takes a single office, so somebody who works out of two is listed under whichever one you set. That's a listing rather than a boundary: to put them on a deal in the other office, type their name into the agent search when you're assigning, which reaches everyone on the account.

It Doesn't Decide What They Can Reach

Access comes from the permissions granted to a person in each Location, so those are what to set and what to check. Somebody can hold permissions in offices they aren't based in, and changing a Primary Location leaves all of them as they were. A master admin reaches every Location whatever the field says.

Where You See It Working

Primary Location is what lists a person under an office and what puts them in that office's Active Users count, since the count reads who is based there. A Location can therefore show a small number of active users while the admins you permitted in it work in it every day.

Set What Someone Can Reach in an Office

If the question that brought you here was really about access, this is the setting that answers it — and it's set per office, one person at a time.

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

See User Permissions

Update Where Someone Is Based

Primary Location sits on the person's own record, alongside the rest of what your account knows about them.

A user's profile holds who they are and where they work — their name, role, primary location, and license number.

See User Profile

Frequently Asked Questions

Can one person belong to two of our offices?

No — a profile holds one Primary Location. Somebody splitting their week between branches is listed under the one you set. It doesn't keep them off the other office's work: type their name into the agent search when you're assigning a transaction and they're there, wherever the deal lives.

Who changes somebody's Primary Location?

An admin, from the person's record on the *Manage Users* page. It takes the "Create users and locations" permission in that Location, so a master admin can always do it. Not seeing the field? Email **help@paperlesspipeline.com** with the person's name and the office they should be in, and we'll move them.

Does changing a Primary Location change what someone can see?

No. Their permissions are exactly what they were. Access is granted to a person Location by Location, and that grant is what decides which transactions they can open. Primary Location records where they're based and nothing more.

We opened a new office. Do I add our master admins to it?

No — they already reach it. A master admin has every permission in every Location on the account, including ones created after they were set up. The only thing worth deciding is whether their Primary Location should change to the new office, which is a listing choice rather than an access one.

Our new Location shows barely any active users. Did the setup go wrong?

No. The count reads Primary Location. It counts the people based in that office, not everyone permitted to work in it. Admins and agents you granted permissions there are working normally whether or not the count includes them.

Can one person be an admin in one office and an agent in another?

Not on one login. A profile carries one set of details and one Primary Location for the whole account. Where somebody genuinely needs a separate identity in a second office, add them as a second user with a different email address — an alias on the same mailbox works — and give that profile only the Location and permissions it's for. Two profiles can't be merged afterwards, so add the second one only where the separate identity is genuinely needed.