

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](#)

Location Membership FAQ

A profile holds one Primary Location, and permissions decide the rest. Answers to the common questions about belonging to two offices, who changes the field, what it does to access, and what a Location's user count is counting.

See [Location Membership FAQ](#)
