One Person, Two Roles (Broker Who Is Also an Agent)

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You run the office and you also carry your own listings. One profile almost always covers both — and there's exactly one reason to reach for a second.

Introduction

Plenty of people in Pipeline wear two hats. You're the managing broker and you still sell. You were office staff and you just got licensed. You own the company and you also coordinate the files. The work splits cleanly in your head, so the instinct is that it should split in Pipeline too: one login for the admin side, one for the agent side.

It usually shouldn't. An admin profile already holds every permission agent work needs, and the role you play on any given transaction is set on that transaction, not by your account permissions. From one login you're the agent on your own deals and the admin on everyone else's.

There's one thing a single profile genuinely can't do, and it's worth knowing before you decide: it can't send you email scoped to one of your two roles. That's the whole fork. Everything below walks the single-profile setup first, then shows you where the line is.

When to Use This

- You're the managing broker and you also list and sell your own properties.
- You were office staff, you just got your license, and you're wondering if you need a separate agent login.
- You own the company and you also coordinate transactions day to day.
- Your daily reminder email is every agent's tasks and you just want your own.
- You already have two profiles and you can't tell which is which when you assign a transaction.

Why This Starts With One Profile

Two roles feel like they need two logins, and they almost never do. Nothing about being an admin stops you from being an agent — the permissions are a superset, not a different set. When you add yourself to your own listing, you're the agent on it, and that's true no matter what your account-level permissions say. One person, one login, both hats.

The reason to be careful about the second profile isn't difficulty, it's permanence. Two profiles can't be merged later — there's no one-click switch and no consolidation tool. If you decide six months in that you'd rather have one, moving your commissions from one of your profiles to the other means opening every affected transaction, reassigning the agent, saving, and re-entering commissions so the CDA regenerates against the right name. One broker who went down this road had seven files to redo by hand. Start with one, and add the second only if the next few steps prove you need it.

1. Check What Your Current Profile Already Does

Before you add anything, look at what you're already holding. If you're an admin or a master admin, the answer is almost certainly "everything you need" — and this step is mostly about confirming that so you can stop worrying about it.

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

See User Permissions

2. Set Your Role to Match the Work You Do

Your profile carries a role, and it isn't decoration — Pipeline uses it to decide what's aimed at you. If you're set as an Agent, you're included in @agent mentions, which is why other agents' activity shows up highlighted in green on your screen. If that's noise rather than signal for you, changing your role to Admin or Broker takes you out of those mentions and the highlighting stops.

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

See User Profile

> Changing your role changes what's addressed to you, not what you're allowed to do. Your permissions are set separately and stay exactly as they are. You can still be listed as the agent on your own transactions with your role set to Broker.

3. Pull Your Own Deals Out of the Company's List

This is the part people think they need a second profile for, and they don't. Your transactions list shows everything you can see, which as an admin is the whole office — so your own six listings are buried in three hundred files.

Search by agent name to narrow the list to just your deals, then save that search as a custom shortcut so it's one click from then on. That gives you your agent view and your admin view from the same login, without maintaining two of anything.

> Searching and shortcuts work the same way here as they do everywhere else in Pipeline — nothing about wearing two hats changes them. Your admin view is still the default; the shortcut is just a saved way back to your own work.

4. Decide Whether You Actually Need a Second Profile

Here's the line. Pipeline's automated email follows access, not intent. Your Daily Task Reminder contains every task you can reach, and as a master admin you can reach all of them, company-wide. There's no filter that trims it to your own files, and that's by design rather than an oversight — the mail is built from what you're allowed to see.

So if what you want is a reminder email about *your* listings and not the whole brokerage's, one profile can't give you that. A second, agent-only profile can, because it only has access to your deals and its mail is built from that. That's the one job the second profile does. If your reminders aren't bothering you, stop here — you're done, and you've saved yourself the upkeep.

> Go in knowing the trade. Two profiles can't be merged afterward, and your commission history splits across whichever profile was on each transaction — reuniting it later is a manual pass through every affected file. Weigh that against the value of a cleaner inbox before you commit.

5. Set Up the Second Profile

Going ahead? The second profile is an ordinary user — you're just the person it belongs to. Give it agent-level permissions only, scoped to the location you work in, so its email stays narrow. That narrowness is the entire reason it exists.

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]

Hold a Pipeline profile at two brokerages at once — both accounts open side by side, every notification still landing in the one inbox you already watch.

See [Manage Your Pipeline Login Across Brokerages]

6. Name the Two Profiles So You Can Tell Them Apart

This is the one that bites in practice. Both profiles carry your name, so when you assign an agent to a transaction you get two identical-looking options in the dropdown — and picking the wrong one puts the commission on the wrong profile.

Name them so the difference is obvious rather than a guess. Brokers commonly put the entity name on the broker profile and their own name on the agent one. If the profile you want renamed is a master admin, email us at help@paperlesspipeline.com with which profile and the name you want on it, and we'll set it.

7. Keep Master Admin on Only One Profile

Master admin belongs on the profile you do your admin work from, and nowhere else. Your agent-only profile should be exactly that — if you grant it master admin, it can see the whole company again and its email goes back to covering everything, which undoes the only reason you created it.

> You can't remove master admin from the profile you're logged in as. If it ended up on the wrong one, sign in as the other profile and remove it from there.

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]