User Profile

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

Introduction

A name is spelled wrong, or somebody has legally changed theirs and the old one is still showing on every transaction they touch. A user's profile is where that gets put right, and it's the same place their details were set on the day they were added.

A profile is the short set of facts Pipeline needs about a person, plus whatever else is useful for you to keep. Some of it carries weight: the name is how they appear to everyone else on a transaction, and the login email is what they actually sign in with. The rest is yours to fill in or leave blank. It's worth knowing what a profile isn't, though. It's a record of who somebody is on your account rather than a personnel file, so it holds details and not documents.

Keeping profiles current is what keeps everything else readable, since reports, transaction histories, and the messages Pipeline sends on somebody's behalf all carry the name from the profile. One case is worth a second thought before you edit. When a person leaves and somebody else takes over the same job, renaming their profile blends two people's work under one name. Setting the new person up on their own profile keeps the trail honest about who did what.

How It Works

A profile is split into the essentials a user needs to sign in and the extra details that round out their record.

Name

The user's first and last name. This is how they appear throughout Pipeline — on transactions, in menus, and in the messages Pipeline sends on their behalf.

Login Email

The email address the user signs in with, and the address Pipeline sends their messages from. Every login email is unique across all of Pipeline.

Primary Location

The user's home base. It's where they're anchored on your account, though you can still grant them permissions in other locations. See User Permissions.

Role

A label for what the user does — for example, agent or admin. Roles help you organize and filter your roster; you can search the Manage Users page by role. See User Search.

Additional Details

Optional fields let you record more about each user, including their license number, a start date, and other notes.

Fill in what's useful to your team and leave the rest blank.

Add a User

> Add a new user from the Manage Users page in your admin settings. Every field is described in Adding a User.

> **Who Can Do This**: Admins with the "Create users and locations" permission, and master admins.

To add a user:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Click [Manage Users], then [Add User].
2. Complete the form for the new user — outlined in Adding a User — then click [Add User] to save.

The new user appears on your Manage Users list, ready for you to fill in the rest of their profile.

Edit a User's Profile

> Open and update a user's profile from the Manage Users page.

> **Who Can Do This**: Admins with the "Create users and locations" permission, and master admins.

To edit a user's profile:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users].
3. Search for the user's name or email address.
4. Click their name, or click the [Gear] next to them and select [Edit User].
5. Update any of their details, then save.

Your changes take effect right away. You can return and edit a user's profile as often as you need.

User Profile FAQ

A profile holds a user's name, login email, primary location, role, and optional details. Answers to the common questions about who can edit a profile, changing a name or email, and updating your own. See User Profile FAQ.

Ways to Use User Profile

See User Profile at work inside a bigger job:

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