Welcome Emails

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Send new users their login details the moment you're ready — and not a second before.

Introduction

Adding somebody to Pipeline and letting them in are two separate moves. A new user can sit in your account fully set up, with permissions sorted and a location assigned, and hear nothing at all until you decide to send their welcome.

Pipeline doesn't let people sign themselves up, so there has to be one moment where credentials cross from your side to theirs. The welcome email is that moment. It carries what somebody needs for a first sign-in, and the temporary password inside it really is temporary: Pipeline asks them to replace it with one of their own straight away, so you never end up holding a password that belongs to someone else.

Done in that order, your team is ready before anyone is asked to do anything about it, and nobody is sitting on credentials for an account that isn't finished. One thing is worth doing on your side, though. An email arriving cold with login details and instructions to start using a new system reads as suspicious, and agents do write in asking whether they're being phished. A word from you before you send saves that conversation.

How It Works

There are two ways to welcome people in: all at once, or one at a time. Both live on the Manage Users page.

Collectively vs. Individually

Send welcomes **collectively** when you're rolling out Pipeline to a group and everyone should get started together. Send them **individually** when you'd rather onboard people at your own pace, one agent at a time.

What the Welcome Email Contains

The email includes the user's login details and instructions for signing in. When they first log in, Pipeline asks them to create a new password of their own.

Only Unsent Users Get It

Sending welcomes collectively only reaches users who haven't logged in yet — so no one who's already active gets a surprise reset. As you add more people later, you can run it again and only the new folks are emailed.

Welcome Everyone at Once

Send welcome emails to everyone who hasn't logged in yet, in one step.

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

To welcome everyone at once:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users] from the left menu.
3. Click [Send Welcomes].
4. Confirm by clicking [Send Welcome Emails].

Pipeline resets the passwords for everyone who hasn't logged in yet and emails each of them their welcome. Users who are already active are left alone.

Welcome One User at a Time

Send a single user their welcome email to onboard people at your own pace.

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

To welcome one user at a time:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users] from the left menu.
3. Click the [Gear] next to the user you want to welcome.
4. Select [Reset Password].
5. Confirm by clicking [Send Welcome Email].

That user receives a welcome email with instructions for logging in and setting their own password.

See Who Actually Came In

Sending a welcome and getting somebody logged in are different things. One report answers it without asking around: every user gets a last-login date, blank for anyone who has never signed in, and a column that flags the people still using the temporary password from their welcome.

Download the Usage by Agent report to see who's logging in, who's uploading, and who hasn't touched Pipeline at all.

See Usage by Agent

Frequently Asked Questions

I skipped the welcome email when I added the user. How do I send it now?

Reset their password from Manage Users. Click the [Gear] next to the user, select [Reset Password], and confirm [Send Welcome Email]. That sends the welcome you held back during setup. See Welcome Emails.

Does resending a welcome email change the user's password?

Yes. Sending a welcome resets the user's password and issues a fresh temporary one, so only resend it for people who haven't logged in yet or who need a new password.

Will "Send Welcomes" email people who are already using Pipeline?

No. The collective [Send Welcomes] step only reaches users who haven't logged in yet — anyone already active is left untouched.

My new agent's temporary password isn't working. What should I do?

Send a fresh welcome to reset it. From Manage Users, click the [Gear] next to the agent, select [Reset Password], and confirm. Have them log in using the newest email, since only the most recent temporary password is valid.

Can users change the password in their welcome email?

Yes — and Pipeline asks them to. The first time a user logs in, Pipeline prompts them to create their own password, so the temporary one from the welcome email is only used once.