Admin / Staff (Location Admin)

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A location admin runs the day-to-day inside the locations they're given — reviewing docs, managing checklists, and seeing every transaction there.

Introduction

Ask a broker who the admins are in their account and the answer is usually a guess. There's no box that says admin and no list to pull, because location admin isn't a title somebody gets handed. It's what a person becomes once they can see every transaction in a location.

That's the middle tier of your account, and in most brokerages it's where the day-to-day work sits. A location admin is who the office goes to when a doc needs reviewing, a checklist needs sorting, or somebody wants to know where a file has got to. They see everything happening in the offices you've put them over and nothing in the offices you haven't. The rest of the role is yours to shape, since what they can do beyond looking is what you grant them.

Used deliberately, this is how you give somebody real authority over one office without handing over the account. That's the distinction worth keeping hold of: the tier answers who runs this office day to day, and it stops at the edge of the offices you named. If what somebody needs genuinely reaches past that, you're looking at master admin, and that's a bigger decision than it appears.

How It Works

You grant location admin access per location, and you can pair it with other admin permissions to match the person's responsibilities.

Admin Access Is Per Location

Someone with **View all transactions** in some locations but not others counts as a location admin only where they have it. That's how you give someone full oversight of one office while keeping them out of another.

What a Location Admin Can Be Given

On top of viewing all transactions, you can grant a location admin the admin-level permissions their role calls for, such as:

- **Review docs** — mark transaction docs in the location as reviewed. We recommend pairing this with View all transactions so they have full access to what they're reviewing.
- **Delete any docs in this location** — delete unassigned and transaction docs, including reviewed ones.
- **Fully manage checklists and templates** — manage templates, check off and edit tasks, change due dates, and assign templates.
- **Mark docs as entered** — track which docs have been entered into your accounting system.
- **Create users and locations** — create and edit users and locations.

These permissions are meant for admins, not agents — several of them grant access to every agent's transactions or documents in the location. For the full list and what each one does, see Agents.

Name a Primary Admin for the Location

Each location can also have a *primary admin* — the person Pipeline sends system-generated emails from (daily task reminders, expiration and closing notifications), giving agents the right go-to person to reply to. If no primary admin is set, those emails come from the Admin/Support contact, or from the master admin if no support contact is set.

Make Someone a Location Admin

Grant someone the **View all transactions for this location** permission to make them a location admin there.

Who Can Do This: A master admin, or a user with the **Create users and locations** permission.

To make someone a location admin:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Users] from the left menu.
3. Search for the user, then click their name to open their profile.
4. For the location you want, check **View all transactions for this location**. Add any other admin permissions the role needs.
5. Click [Update User].

They're now a location admin for that location and can see all of its transactions. Repeat for any other location where they need admin access.

Make Them the Name on the Office's Mail

Granting the permissions doesn't change who Pipeline's automatic emails come from. That's a separate checkbox, and until it points at somebody in the office, daily reminders and closing notices keep going out under whoever the account falls back to.

Give each Location a primary contact so agents know who to reply to, and system emails come from the right person.

See Primary Location Contact

Admin / Staff FAQ

Location admins get oversight of the locations you choose, with the exact permissions you grant. Answers to the common questions about what makes someone a location admin, per-location access, and admins who are also agents. See Admin / Staff (Location Admin) FAQ.

Ways to Use Admin / Staff (Location Admin)

See Admin / Staff (Location Admin) at work inside a bigger job:

- Give a Branch Manager Access to Only Their Office