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.

The Primary Contact Is a Separate Setting

Being a location admin doesn't make someone the location's primary contact. That's one user per location, set with **Make this user the primary contact for this location** on their profile, and it can be any admin you choose.

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 One Agents Reply To

Granting the permissions doesn't change who agents reach when they reply to Pipeline's automatic emails. That's a separate checkbox, and until it points at somebody in the office, replies to daily reminders and closing notices keep going to whoever the account falls back to.

Give each Location a primary contact so agent replies to system emails reach the right person.

See Primary Location Contact

Frequently Asked Questions

What makes a user a location admin?

The "View all transactions for this location" permission. Granting it lets the user see every transaction in that location and tells Pipeline to treat them as admin staff there. From there you can add other admin permissions as needed.

Who can make someone a location admin?

A master admin, or a user with the "Create users and locations" permission. Open the user's profile under [Manage Users], check View all transactions for the location, and click [Update User]. See Admin / Staff (Location Admin) for the steps.

Can someone be an admin in one location but not another?

Yes — admin access is per location. A user with View all transactions in some but not all locations is only treated as a location admin where they have it. That lets you give full oversight of one office while keeping them out of another.

Can a location admin also work as an agent?

Yes — it's the same login. Admin access and agent work live in one account. A location admin can still be assigned to and manage their own transactions; they don't need a separate agent account.

My admin can't change a transaction's location. Why?

Changing a transaction's location is a master admin action. The "Create users and locations" permission lets an admin create and edit users and locations, but moving an existing transaction between locations is reserved for master admins. See Master Admin.

Who do agents reach when they reply to a notification email?

The location's primary contact, not every location admin. Only one user per location holds it. See Primary Location Contact.