Give a Branch Manager Access to Only Their Office

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Your branch manager runs one office, and their access should stop at its door. Pipeline scopes every permission by location, so it can.

Introduction

When a brokerage grows past one office, someone has to run each one. That person needs real oversight of their branch: every transaction in it, the documents, the checklists, the agents. And no view at all into the office across town.

Pipeline is built for this. Almost every permission belongs to a location, so "admin here, nothing there" isn't a workaround; it's how the permission model works. The job is to get the office set up as its own location, then hand the manager the keys to that one door.

When to Use This

- You've opened a second office and its manager needs to see that office's deals, not the whole company's.
- Your branch manager keeps emailing you for files you'd rather they pull themselves.
- Someone manages one office but still sells out of another, and you need them to be both.
- A team leader should see their team's transactions without seeing the rest of the brokerage.
- You tried making them a master admin, realized it handed them the entire company, and undid it.

Why This Beats Making Them a Master Admin

The instinct is to reach for master admin — they're a manager, so give them the manager account. But master admin isn't a bigger version of location admin, it's a different thing entirely: it's account-wide by definition, and there is no way to limit it to one location. Grant it and your branch manager can see every office, every transaction, and your billing.

What you actually want is the permission that already does this. **View all transactions for this location** gives full oversight of one office and stops there — and because it lives per location, the same person can hold it in the branch they run and hold nothing at all in the branch they don't.

1. Give the Office Its Own Location

Everything here hangs off locations, so the branch has to exist as one before you can scope anything to it. If your offices are already separate locations, you're done with this step.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See [Adding a Location]()

> A location doesn't have to be a physical office. If what you're really scoping is a team or a region, make that

> a location too — the permission model treats it exactly the same way.

2. Grant View All in That Location Only

This is the move that makes them a branch manager in Pipeline's eyes. Check **View all transactions for this location** for their office, and leave it unchecked everywhere else. They'll see every transaction in that branch without being added to any of them, and nothing in the branches where the box is clear.

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

See Admin / Staff (Location Admin)

> A manager who also sells is a normal setup. Grant the admin permissions in the office they run and leave them as a plain agent in the office they sell out of — one person can be an admin in one location and an agent in another.

3. Add the Rest of the Permissions the Branch Needs

Seeing the transactions is not the same as running the office, and this is where most setups come up short a week later. Every permission is its own box in its own location — so a manager who can view their branch's transactions still can't manage its checklists until **Fully manage checklists and templates** is checked for that location, and still can't add an agent until **Create users and locations** is checked for it too.

Walk their office's permission list once and grant what the role genuinely needs. It's a two-minute job now and saves a confused ticket later.

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

See User Permissions

4. Make Them the Primary Contact for the Location

Permissions decide what your manager can do. This decides whether their agents know to go to them at all. Set the branch manager as the location's primary contact and Pipeline's system emails to everyone in that office start coming from their address instead of yours — and they're listed as the office's Manager/Location Admin on those agents' dashboards.

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

> Each location gets one primary contact. If two people share the running of an office, pick the one your agents should be replying to.

5. Know Where Location Admin Stops

Your branch manager now runs their office, and there are three edges worth knowing before they find them for you.

They can't move a transaction into or out of their location. Changing an existing transaction's location is master-admin-only, and there's no permission between admin and master admin that unlocks it. If a deal is filed under the wrong office, it comes to you.

Reports run for one location or for all of them. There's no way to select a custom subset, so a manager over two branches runs two reports and combines them.

Daily task reminder emails aren't scoped per location. They include every task the person can see across every location they have access to — so a manager with a foot in two offices gets both offices' tasks in one email.

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