Find Out Who Is Actually Using Pipeline

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You rolled Pipeline out to the whole office. One report tells you who took it up, who never logged in once, and who never opened their welcome email.

Introduction

Adoption questions arrive a few weeks after a rollout and then again every few months: is everybody in, is anybody stuck, and who did we set up in March who has never touched it. Guessing from the transactions list doesn't answer any of them, because the agents who worry you are exactly the ones with nothing on it.

Usage by Agent is built for that. It downloads as a spreadsheet with a row for every user in the account and a column for each kind of activity over the period you choose, and the people who have done nothing still get a row with empty columns. That's what makes it an adoption report rather than an activity report.

Read it in the right order and it answers three separate questions: who never arrived, who arrived and stalled, and who is quietly doing the work.

When to Use This

- You rolled Pipeline out and want to know how many agents actually started using it.
- You suspect some of the people you set up months ago have never logged in.
- You're paying for users and want to know which ones are real.
- You want to know whether a coordinator or a new admin is doing what you brought them in to do.
- An agent swears they never got their welcome email and you want to check before resending.

1. Download the Report for the Period You Care About

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

> Pick the period to match the question. A 30-day window tells you who's working right now; a full year tells you who has ever engaged at all. For a rollout check, the longer window is the honest one, because somebody who logged in once in February and never again still looks active on a short view.

2. Find the People Who Never Arrived

Open the file and go to **Last Login**, column G, first. A date there means the person has been in at least once. A blank means they never have, not once, since the day they were added, and that blank is the single most useful cell in the report.

Then read the **Has Temp Password** column beside it. A *Yes* there means the person is still signing in with the password their welcome email gave them, which almost always means the welcome email never got acted on. Those two columns together separate the agents who are resisting Pipeline from the agents who were never really let in.

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

See Welcome Emails

3. Read the Activity, Not Just the Logins

Logins in the period, column K, tells you somebody showed up. The columns around it tell you what they did once they were there: docs uploaded, docs reviewed, transactions created, transactions closed, and maildrop use. An agent with twenty logins and nothing else is browsing. An agent with four logins and thirty docs uploaded is working.

There's no way to filter the report to one person inside Pipeline, and there doesn't need to be. It's a spreadsheet, so sort by the column that answers your question and read the top or the bottom of it, depending on which end you're worried about.

4. Cross-Check It Against Your Roster

Usage tells you what happened. It doesn't tell you what each person was set up to do, which is the other half of an adoption review — an agent with no uploads may not have permission to upload, and someone who never logged in may have been added last week.

Some of Pipeline's lists come out as their own spreadsheet — your user roster and a transaction's checklist timeline, ready to work with offline.

See List Downloads

> The user list carries each person's start date, which is what makes the cross-check fair. Line the two files up and a blank **Last Login** next to a start date from eight months ago means something entirely different from the same blank next to a start date from Tuesday.

5. Trace One Person's Work on a Deal

Usage by Agent gives you dates and counts. It doesn't give you timestamps, session lengths, or a list of which transactions somebody opened, and there's no report anywhere in Pipeline that traces one person's edits across the whole account.

What exists is the trail on each transaction, which is where a real question about a specific change gets answered.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

To find which transactions a departing or departed user is attached to, don't go through the usage report. Global Search on **agent:** with their name or email address returns every transaction they're on, of any status, whether or not their account is still active.