Company Settings

The page Admin / Settings opens on: every account-wide setting, box by box in the order you see it, with where each one is explained.

Introduction

Company Settings is one long form that shapes how the whole account works. Your company's details, how docs and emails behave, what the coversheet prints, which features are turned on, and what every new transaction starts with all live here.

Most settings carry their own help text on the page, so the screen tells you what a box does. This page tells you where the longer answer lives.

How It Works

One page, a stack of boxes, and one button that saves them all.

Where It Lives

Company Settings is the page that opens when you click the [Gear], then [Admin / Settings]. It's also **Company Settings** in the Customize section of the left menu.

Boxes From Top to Bottom

The form runs from **Global Settings** at the top to **Appearance** at the bottom. This page follows the same order.

One Save for the Whole Form

A single [Save Settings] button at the bottom of the page saves every box at once.

Global Settings

Your Company Name and License

Company Name and **Brokerage License #**. The name is required and can be up to 50 characters.

Set the company name and brokerage license number that identify your account throughout Pipeline.

See Company Name & License

Document Settings

PDFs Only

Only allow PDF documents: "Require users to upload all their documents in PDF format."

Restrict uploads to PDFs and you can preview, rotate, merge, and break apart everything that lands in your account without leaving Pipeline.

See PDF-Only Restriction

No Duplicate Uploads

Prevent duplicate document uploads: checks agents' uploads so each file goes in once. "Admins will still be able to upload duplicate docs."

Switch on duplicate prevention and Pipeline checks every agent's upload against what's already on the transaction, so the same file can't land twice.

See Duplicate Doc Prevention

Email Settings

Closing and Expiration Reminders

Email agents expiring and closing transaction reminders: "Automatically email your agents 5 days in advance of a listing expiration or closing."

Five days before a transaction is set to close or a listing is set to expire, Pipeline emails the agent a heads-up — automatically, across the whole account.

See Closing & Expiration Reminders

Doc Comment Emails

Email agents when admin comments on documents: "Automatically email agents whenever an admin comments on documents visible to them."

An admin leaves a comment on a doc, and Pipeline emails it to the agent with a link straight to the document.

See Doc Comment Notifications

Plainer Emails

Use minimal formatting for messages sent from transactions: "Enable this setting to send minimally-styled emails when sending messages from transactions."

Minimal formatting takes the gray box and the Pipeline logo off messages sent from transactions, so what lands in a recipient's inbox reads like a plain, ordinary email.

See Minimal Formatting

Transaction Coversheet Layout

The Layout and Its Fields

A dropdown to **Select the layout that best meets your office's needs**, then nine checkboxes to **Choose which fields should be included in the selected coversheet layout**: Commission Info, Optional Fields, More Info, Custom Date Fields, Key Dates, Custom List Fields, Contacts List, Custom Text Fields, and Contingency Dates.

Choose which details lead your company's coversheet and which fields appear on it at all.

See Coversheet Layout

Feature Settings

Two-factor Sign-In

Require two-factor authentication: "When logging in on an unrecognized device, users will be emailed a link to complete the login process."

Two-factor authentication adds a second step when you log in on a device Pipeline doesn't recognize: an email to finish logging in, with a link to click or a code to type.

See Two-factor Authentication

Reviewed Docs

Enable Reviewed Docs functionality: "Allow docs to be marked as reviewed for compliance purposes."

You sign off on a doc by checking Reviewed — that clears it from the queue, locks it against edits, and records who reviewed it and when.

See Doc Review

Entered Docs

Enable Entered Docs feature: "Keep track of which documents have been entered into your accounting system (e.g. Quickbooks, Lonewolf)."

Already keying closed files into QuickBooks, Lone Wolf, or another outside system? Turn on Entered Docs and every doc gets a second checkbox so you can track what's made it across.

See Entered Docs

New Offers

Enable New Offer feature: "Enable the ability to duplicate existing transactions through the "New Offer" option of a transaction."

Restart a deal or take the next offer as a new transaction, linked to the one before it.

See New Offers

Checklist Settings

Completion Percentages for Agents

Show checklist completion percentages to agents: "If unchecked, only admins will see those completion percentages."

See how far along a transaction is at a glance — shown as a percentage or a ratio of completed tasks.

See Completion Percentage

Hidden Completed Tasks

Hide completed tasks in transaction checklists: hides completed tasks from every checklist, with a "Show completed tasks" link at the bottom of any checklist that has some.

A completed task is one an admin has verified and checked off — and Pipeline can hide completed tasks so your checklists stay clean.

See Completed Tasks

Checklists From Every Location

Show checklists from all locations in the Add Checklists dropdown menu: "If unchecked, only checklist

templates from the location of the transaction being viewed will be available to be added to that transaction."

Add a checklist to a single transaction by hand — for when it wasn't assigned automatically.

See Applying a Checklist

Transaction Settings

Listings That Expire Themselves

Enable auto-expiration of transactions in Listed status: moves a Listed transaction that hasn't gone to Pending by its expiration date to your Expired/Withdrawn status.

Let Pipeline retire a listing on its expiration date, so nothing lingers on your active list past the day the agreement ended.

See Automatic Listing Expiration

No Early Closes

Prevent changing transactions to closed before their close date: "If checked, a transaction can't be marked closed while its close date is in the future."

Stop a deal from being marked Closed while its close date is still ahead, so a closed transaction never carries a closing day that hasn't happened yet.

See Early Close Prevention

A Label on Every Transaction

Require transaction label: "This setting will only be enforced if you have pre-defined at least one transaction label."

Labels are your transaction types, from property types to the other kinds of deals your office works, and they drive the checklists Pipeline auto-assigns.

See Transaction Labels

Agents Renaming Transactions

Allow agents to edit transaction names: "Allow any Buying Agent on a transaction to change the Transaction Name until the transaction's status is Pending."

A transaction's name is how you'll recognize it at a glance — set it to match your office's convention.

See Transaction Names

Agents Closing Transactions

Allow agents to change transaction status to closed, terminated, and expired: "Uncheck this box if you only want office admins to close and terminate transactions."

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

Each Side's Messages

Prevent agents from viewing other side's messages on transactions: "If checked, agents on one side of the transaction will only be able to view their own messages, non-private messages sent by agents on

the same side of the transaction, and messages from admins."

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

Closed Deals Only in Backups

Only include completed transactions in monthly backups: "Check this box to include only Closed, Fell Through, and Expired transactions in your company's monthly backups."

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

A Naming Reminder

Transaction name instructions: "Add transaction naming instructions to be shown to your agents and admins when they are creating or editing a transaction. Leave empty to use the system's default instructions."

Show your team a naming reminder right under the transaction name field, so files are named your way every time.

See Transaction Naming Instructions

Pre-Filled Text on New Deals

Pre-filled default value for the **More Info**, **Admin Info**, and **Commission Summary** fields: text added to that field on every new transaction.

Pre-fill the More Info, Admin Info, and Commission Summary fields on every new transaction so nothing important gets forgotten.

See Default Field Values

Optional Contingency Date Fields / Checklist Trigger Dates

Contract Dates You Turn On

Nine date checkboxes, from **Inspection Due Date** to **Option Period End Date**. Checking one adds it to every transaction and lets task due dates and scheduled messages count from it.

Turn on prebuilt fields like inspection dates and earnest money to track the details your team cares about.

See Optional Fields

Dates Deadlines Count From

Each date you check here also becomes a trigger date.

Pick the date a deadline counts from, and Pipeline works the rest out on every transaction — for task due dates and scheduled messages alike.

See Trigger Dates

Other Optional Fields

Details You Turn On

Earnest Money Amount, **Year Built**, **Lockbox Code**, **Financing Type**, and **Home Warranty**. Each one turns that field on for all transactions.

See Optional Fields

Welcome Message Settings

Your Welcome Email

New user welcome email subject and **New user welcome email message**. "The user's sign-in information will be automatically inserted below your message." Leave either blank and Pipeline uses its default.

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

See Welcome Emails

Admin & Support Contact

Who Your Team Asks

Name, **Email**, and **Phone**: "Team members will see this on their Home page."

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact

Home Page Announcement

A Message on Every Home Page

Announcement: "Post an announcement to appear on the Home page for all users in your account when they login." Up to 300 characters, and the Home page shows at most four lines.

Post a short message to the top of everyone's Home page to share news, a reminder, or a link with your whole team.

See Company Announcement

Appearance

Your Logo

Company Logo: "Your logo must be a .jpg or .png file. Your image will automatically resize to fit 195px wide by 85px tall."

Add your brokerage's logo so your Home page, coversheets, and commission documents all carry your

brand.

See Company Logo