Add Agents to Pipeline Without Giving Them Access

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Put every agent on your roster so each deal, report, and commission credits the right person, while nobody gets a login they weren't meant to have.

Introduction

Some offices run Pipeline with only the admins and the transaction coordinator signing in. Agents hand over paperwork and never open the app. Other offices want the whole roster built now and the doors opened later, one training day at a time. In both cases the agent still has to exist in the account, because a transaction credits its sale and its commission to a user, and a report only counts the people it knows.

Adding a user and letting them in are two separate moves in Pipeline. A profile can sit in your account for years with nobody ever signing in to it. What decides whether the agent hears from Pipeline is the login email you give the profile, the welcome you never send, and a short list of switches that would otherwise email them on their own.

Once that's set, the day to day is ordinary. You assign the agent to deals the way you assign anyone, and reports and CDAs credit them. When you want to reach them, you email them the way you'd email someone outside the account. You do it on purpose, and only then.

When to Use This

- Only your transaction coordinator signs in, your agents never will, and you still want each deal and its commission credited to the agent who earned it.
- You're building the roster before a training day and don't want anyone signing in, or hearing from Pipeline, until you say so.
- Agents who don't use Pipeline are getting task reminders, comment emails, or closing reminders and asking what they are.
- You've been adding yourself as the agent on every file and the real agent as a contact, and your production reports show it.
- An agent's real address is already held by a Pipeline profile at another brokerage and you need them on files today.

Why a User and Not a Contact

The workaround most admins reach for is to add themselves as the agent, so the listing or buying side is filled, and to add the real agent as a contact so they can be emailed. It works until you run a report. Production and commission figures credit the admin, not the agent. If you ever open access, none of the agent's deals are on their profile. And a note on a contact stays on that one transaction, where a note on a user profile follows the person to every file they're on.

Pipeline doesn't charge per user, so a full roster costs nothing more than a partial one. The one no-access slot Pipeline does have is for the agent on the other side of the deal: Outside (Co-op) Agents are recorded for reference and never get in. Your own agents belong under Manage Users, whether or not they ever sign in.

1. Give the Profile a Login Email the Agent Doesn't Read

The login email is the address the agent would sign in with, and it's the only address a password reset goes to. Give the profile an address they don't read and there's nothing for them to request. You have two choices. One is a made-up variant of their real address, such as a letter and a hyphen in front of it, that delivers nowhere. The other is a plus-address alias on your own address, so anything Pipeline sends the profile lands in your inbox. Making one is in Run Two Pipeline Logins From One Inbox. The alias is the stronger choice. Nothing bounces, a notification you forgot to switch off turns up where you'll see it, and it's the only route that lets you sign in as the agent later.

Add the user from the Manage Users page with their real name, their primary location, and the address you picked.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

A stand-in address also helps when the agent's real one is refused because a profile at another brokerage still holds it. It gets them onto your files today, and Add an Agent Whose Email Is Already in Use Elsewhere covers freeing the real one for later.

Sign in with your login email address, and get Pipeline's emails and the replies to your messages there.

See Login Email Address

2. Leave the Welcome Unsent

Since April 2024 there's no password field on the Add User page. Pipeline generates the password and it travels only inside the welcome email, so an unsent welcome is what keeps the profile closed. Uncheck **Send this user a welcome message** as you add them and nothing goes out.

One thing to know before you rely on it. [Send Welcomes] on the*Manage Users* page emails every user who has never logged in, and these agents stay in that group for as long as the profile exists. With a made-up address the welcome goes nowhere; with your alias it lands on you. Once you have no-access agents on the roster, welcome real new hires one at a time from the gear beside their name rather than with the collective button. Adding a whole roster at once? Bulk-Onboard a Roster of Agents loads it with nobody hearing a word.

Building the roster and releasing the logins are two separate moments, and one checkbox keeps them apart. Leave it unchecked and nobody hears from Pipeline until you're ready for them to.

See Add Users Now and Send Their Logins Later

3. Skip Permissions and Uncheck the Daily Task Email

Leave every permission box empty. A profile with no permissions still takes assignments, takes credit on reports, and holds notes; User Permissions only decide what a person can do once they're signed in, and this person never will be.

Then uncheck **Send daily email with upcoming tasks to this user** on the same form. It's the one automatic email with a per-user switch, and it is per user only: there's no bulk path, so a roster of no-access agents means opening each profile in turn. Change a Setting Across Every User at Once says the same, and lists what our team can do in batch.

Start each day knowing exactly what's due — Pipeline emails you a rundown of the tasks that are overdue, due today, and due tomorrow.

See Daily Task Reminder Emails

4. Decide What to Do About the Company-Wide Emails

Three more emails reach agents, and each comes from one switch a master admin sets for the whole account under **Email Settings**. Closing & Expiration Reminders go out five days before a Close Date or an Expiration Date. Doc Comment Notifications go out whenever an admin comments on a doc. The monthly production summary goes out once a month. None of the three has a per-user version. If nobody in your office signs in, turn all three off and you're done.

If some of your agents do use Pipeline, leave the switches on and let the address you gave the no-access profiles do the work. A plus-address alias delivers those emails to you, where you can read them or filter them. A made-up address delivers nothing, and an address that keeps refusing mail can end up blocked on our side, which is harmless for an address nobody reads.

Some of Pipeline's automatic emails are one switch for the whole company and some live on each person's own profile. Knowing which is which is the whole answer.

See Control Which Automatic Emails Your Team Gets

5. Sign In as the Agent Once and Switch Off Their Personal Email

The monthly production summary has a second switch on the agent's own profile, and only someone signed in as that agent can reach it. Since the password now arrives only by welcome email, that means sending the welcome to the alias you control. Sign in with what it carries and set the password Pipeline asks for. Then uncheck **Receive monthly production summary by email** under **Your Email Settings**, save, and sign out.

A profile with a made-up address can't be signed in to at all, so for those the company-wide switch is the only lever. Two things soften that: the summary only goes to agents with closed, commissioned production in the current fiscal year, and only on accounts with the reporting module. Signing in as the agent has a second effect worth having: the profile now counts as logged in, so [Send Welcomes] leaves it alone from then on.

Once a month, each agent gets their own numbers by email — last month's production plus the year to date, with nobody having to run a report.

See Monthly Production Summary

6. Assign Them to Transactions as You Would Anyone

From here the work is ordinary. Open the transaction, search for the agent under Assign Agents, tick the side they're on, and save. Reports, CDAs, and production credit follow the assignment. The agent gets none of it by email, and being on a transaction opens nothing for a person with no password in hand.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

7. Email Them Through a Contact, Never Through Their Name

Ticking the agent's name in the message composer, or dragging their agent entry into the external address field, sends the email to the login address, which is either nowhere or you. To reach the agent, add them to the transactior as a contact: a role like Listing Agent, their real email address, their phone. When you write, drag that contact into **Send To An External Email Address**. An email reaches the agent only when you chose to send it, and the contact card gives the rest of your team a number that works.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

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

8. Open the Door Later Without Starting Over

If the office changes its mind about one agent or all of them, nothing is redone. Open the profile from Manage Users and change the login email to the agent's real address. Grant the permissions their work needs. Then send their welcome from the gear beside their name. Every deal they were assigned is already on their profile, so their first sign-in shows them their own files.

A user's profile holds who they are and where they work — their name, role, primary location, and license number.

See User Profile

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

See Welcome Emails