Run Two Pipeline Logins From One Inbox

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An email alias gets one person a second Pipeline login in the time it takes to type a plus sign, and every message from both profiles still lands in the inbox they already read.

Introduction

Pipeline knows a person by their login email address, and an address can sit on exactly one profile anywhere in the product. Most days that rule is invisible. It shows up the day a coordinator who already works in another brokerage's account joins yours, or the day you decide the broker and the agent in you should each have their own login, and Pipeline tells you the address is already in use.

An alias is the way around it that costs nothing to keep. It's a second address that your mail provider delivers to the same inbox: yourname+agent@ instead of yourname@. Pipeline sees a new address and lets you add a new profile with it. Your mail program sees the same mailbox. There's nothing new to check and no second password to forget.

What you end up with is one profile per job, each holding the access that job needs, and all of them reporting to one inbox. The work is choosing which jobs deserve a profile of their own, naming things so you can't mix them up, and telling your mail program where the alias's mail should go.

When to Use This

- A second brokerage tried to add you, or you're a transaction coordinator working for several offices, and Pipeline said your email address is already in use.
- You run the office and carry your own listings, and your daily task reminder lists every agent's tasks when you only want yours.
- You want to sign in as an agent and see your account the way your agents see it before you train them.
- Two people in your office work from one shared mailbox and both need a login of their own.
- You already have two logins and your browser keeps filling in the wrong address, so you land in the wrong account.

1. Decide Which Job Gets Its Own Profile

An alias makes a second profile cheap. Pipeline doesn't charge per user, so the only cost is keeping track of which login is which. That makes the first question whether the job needs a profile at all, and four situations account for nearly every request.

- **A person who works in two Pipeline accounts.** An agent licensed in two states, or a coordinator serving two offices, keeps their real address at the account they work in most and joins the other under an alias. Manage Your Pipeline Login Across Brokerages walks them through it, and Add an Agent Whose Email Is Already in Use Elsewhere is the admin's side of the same conversation. If they're leaving the old brokerage rather than working in both, they don't need an alias. Their address can be released and follow them, which is Keep Your Email Address When You Change Brokerages.
- **A broker who also sells.** One profile already does both jobs. The one thing it can't do is send you Daily Task

Reminder Emails scoped to your own deals, because the reminder follows your access. If that's what you're after, a second agent-only profile under an alias is the answer, and One Person, Two Roles (Broker Who Is Also an Agent) covers the trade before you commit to it.

- **An agent's-eye view of your own account.** An agent-only profile under an alias, say yourname+agent@, lets you sign in and check what a new agent sees: which pages, which transactions, which tasks. Give it the permissions you give a typical agent and nothing more, or the view stops being honest.
- **Two people, one shared mailbox.** Pipeline can't take one inbox as two logins, but office+jane@ and office+bob@ are two addresses to Pipeline and one mailbox to your provider. Each person gets their own profile and their own history. A password reset for either one goes to the shared mailbox, so both of them can reach it.

If someone was added twice by accident, that's a different job and it doesn't start with an alias. SeeConsolidate a Person's Duplicate Profiles.

Whatever the job, the rule underneath is the same, and it's worth knowing before an alias becomes a habit.

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

See Login Email Address

2. Make the Alias and Name It for the Job

With Gmail or Google Workspace there's nothing to set up. Put a plus sign and a word between your name and the @, and the address works the moment you type it. Outlook and Apple Mail offer aliases too; each has its own way of making one, so look in that program's account settings.

Google Workspace counts as Gmail here. If your company mail runs on Workspace, the plus works on your own domain even though nothing about the address says gmail.com.

Put the job after the plus, not a code you'll have forgotten by spring:

- yourname+admin@ and yourname+agent@ for the broker who also sells.
- yourname+abcrealty@ for a profile at a second brokerage, named for the brokerage it belongs to.
- yourname+test@ for an agent's-eye view you'll retire after training.

Gmail also ignores periods, so a dotted version of your address is a second alias on Gmail alone. Outlook and Apple Mail don't do this. Stick with the plus: it's easier to read back, and it works the same way on all three.

3. Add the Profile Under the Alias

To Pipeline the alias is a brand-new address, so the second profile is an ordinary new user. Add it from Manage Users with the alias as the login email, and give it only what its job needs: agent-level permissions for an agent's-eye view or a scoped reminder, the full working set for a coordinator's profile. If the profile lives at another brokerage, send that office the alias and their admin adds you from their end.

Send the welcome email. It lands in your own inbox, which doubles as proof the alias delivers.

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

4. Name the Profiles So You Can't Mix Them Up

Two profiles carrying the same name look identical in every agent dropdown, and picking the wrong one puts a commission on the wrong profile.

One more thing shapes the choice. The name on a profile is also the sender name on every email that profile sends and the name on every transaction it touches. So keep your real name on the profile that emails clients, and mark the other one: Jane Smith on the agent profile, Jane Smith (Admin) on the other, or the brokerage name on the broker profile. If the profile you want renamed is a master admin, write to help@paperlesspipeline.com from that address with the name you want.

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

See User Profile

On screen, let the window do the telling. Sign in to each profile in a different browser and give each a different color theme, and you know where you are without reading the address bar. It also stops one browser from offering the wrong saved login. Manage Your Pipeline Login Across Brokerages shows that setup.

5. Point the Alias's Mail Where You Want It

Everything Pipeline sends to the alias profile arrives in your regular inbox, mixed in with the rest. If you'd rather see the second profile's mail apart from the first, a filter on the alias does it.

To route an alias's mail in Gmail or Google Workspace:

1. Click the gear in Gmail, then [See all settings].
2. Open [Filters and Blocked Addresses] and click [Create a new filter].
3. In the To field, type the alias, for example yourname+agent@yourbrokerage.com, then click [Create filter].
4. Choose what happens to it: apply a label, skip the inbox, forward it, or file it under a category. Click [Create filter].

From then on every message to the alias carries that label, so the agent profile's task reminders and the admin profile's sit in different places. Outlook and Apple Mail filter on an address too, under rules rather than filters; the steps are theirs.

If you ever reply from your mail program and want the reply to come from the alias, add it in Gmail under [Accounts and Import], [Send mail as], [Add another email address], and check [Treat as an alias]. The From menu then offers the alias when you write. Most people never need this. Pipeline sends the profile's messages itself, and a client's reply comes back to the login address, which is the alias, which is your inbox.

Every email Pipeline sends for you leaves from one of our addresses with your name on it. Which address, what the recipient sees, and where their reply lands all depend on who you sent it to.

See Outgoing Email

6. Retire a Profile When Its Job Is Done

An agent's-eye profile you made for training, or a profile at a brokerage you've stopped working with, shouldn't stay live. Deactivate it. Access ends, every record it touched stays where it is, and the alias is free to use again. The alias itself needs nothing; it stops mattering the moment nothing signs in with it.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation