Who Can Do What

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Three levels of access, and most people need the smallest one that does their job. The level and the location you give someone is the whole of what they can see, so read this once before you add anyone.

Introduction

A master admin reaches everything, including billing and the settings above. A location admin runs the offices they are given. An agent sees their own work and nothing else. Every permission is granted per location, so the same person can be an admin in one office and an agent in another.

That makes adding a person a two-question decision: which level, and which offices. The account's top seat is the exception worth planning for, since only the current holder can hand it on.

1. Understand the Level You Hold

Full reach across every office and every setting. It is also the address our team verifies account changes against, so the seat is worth deciding as deliberately as the person in it.

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

2. Give Someone One Office to Run

The right answer for a branch manager or a coordinator. They run their offices completely without reaching billing or the account's settings.

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)

3. Know What an Agent Sees

Their own transactions, their own documents, their own tasks. When someone asks why an agent cannot see a file, this is the level to check the question against.

Agents see and manage their own work: their transactions, their documents, their checklists, and nothing they don't need.

See Agents

4. Set What Each Person Can Do Here

Most of what looks like a bug turns out to be this. An agent with no upload button or no visible tasks is an agent

whose permissions have not been set for the Location.

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

See User Permissions

5. Hand the Account to the Next Person

Do it while the current holder is still reachable. From inside the account it is a few clicks, and it keeps the bill, the account email and the name on the door together.

Your master admin is the only person who can hand the role to the next one. Do it while they're still here and the account changes hands cleanly — the keys, the bill, and the name on the door.

See Hand Off Master Admin When the Current One Is Leaving