Personal Settings

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The settings that are yours alone: the Gear in the upper-right corner, then My Info. Who you are to Pipeline, how it looks to you, and how your email reads.

Introduction

Everything here belongs to one person and changes nothing for anyone else. An admin cannot set most of it for you, which is why a wrong signature or a missing shortcut is yours to fix.

The page runs from your identity, your login email and password, through how Pipeline looks and moves, to how the messages you send read and the reports only you can pull.

Who You Are

Your Profile

Name, role, primary location, and license number.

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

See User Profile

The Address You Sign In With

It is your identity in the account and what your access is tied to.

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

See Login Email Address

Your Password

Change one you know here, or reset one you forgot from the sign-in page.

Reset a password you've forgotten, change one you know, or reset one for an agent.

See Password Reset

A Second Step at Sign-In

An email to finish logging in on a device Pipeline doesn't recognize, when your company has turned it on.

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

How Pipeline Looks and Moves

Light or Dark

Switch the theme to match how you like to work.

Switch Pipeline between Light and Dark, whichever is easier on your eyes.

See Color Theme

Hotkeys

A handful of keys cover the moves you make most.

Add a transaction, upload docs, jump between pages, and page through a preview from the keyboard.

See Keyboard Shortcuts

How Your Email Reads

Your Signature

Your name, your contact details, and your look at the bottom of every email you send.

Every email you send from Pipeline signs off for you. Set your own signature and it's your name, your contact details, and your look at the bottom of each one.

See Email Signatures

Signing as Someone Else

Send on an agent's behalf and sign the message as them, or with no signature at all.

Sending on an agent's behalf? Turn on alternate signatures and you can sign the message as them, or send it with no signature at all.

See Alternate Signatures

A Plainer Email

A company-wide switch a master admin sets, which is why your messages may already read this way.

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

Your Messages

Messages You Send Often

Save one and reuse it in a couple of clicks.

Save a message you send often, then reuse it in a couple of clicks the next time a transaction needs it.

See My Templates

What Is Waiting to Send

Preview, fix, send, or delete a scheduled message before it reaches anyone.

Scheduled messages wait in a queue where you can preview them, fix what's wrong, send them, or delete them before they reach anyone.

See Scheduled Messages Queue

Your Shortcuts and Reports

Searches You Saved

One click in your left menu, for as long as you want it there.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

Your Own Commission Figures

Pull them from your profile without asking anyone.

Agents can pull their own commission figures without asking anyone. It sits in your personal profile, labeled Your Commissions.

See My Commissions Report