Manage Locations

SUMMARY
Locations can be used to represent physical office locations, teams, or any other group that benefits from segmented permissions, transactions, and users. Learn how to add, edit, and deactivate *Locations*.

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Introduction

Locations commonly represent the various offices of an agency or brokerage, but they may also represent teams or any other group that benefits from having their permissions and users segmented. (e.g., as a repository for confidential docs, to support special team structures, etc).

Who Can Do This?

Master Admin and admin with permission to "Create users and locations (admin-level permission)" can add, edit, and deactivate *Locations*.

How To

Manage Locations

To manage *Locations*:

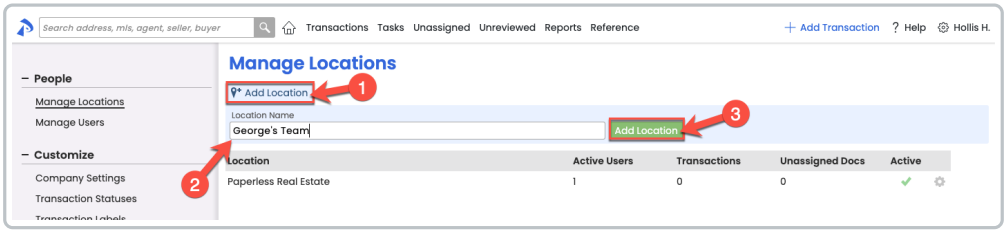
1. **Click your name in the upper right corner then [Admin / Settings].**

2. **From the left menu, click [Manage Locations].**

Add a Location

To add a *Location*:

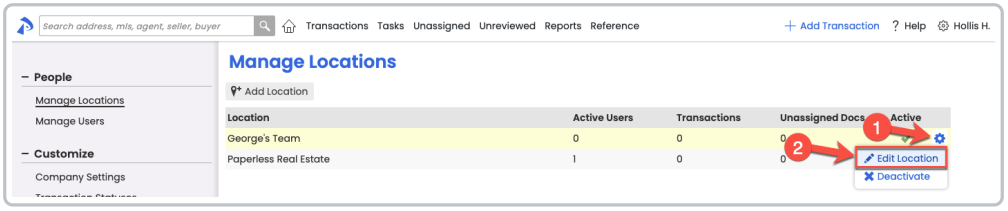
1. Go to the Manage Locations page.
2. **Click [Add Location].**
3. **Enter a *Location* name.**
4. **Click [Add Location].** Your new *Location* will now appear in the *Locations* list.



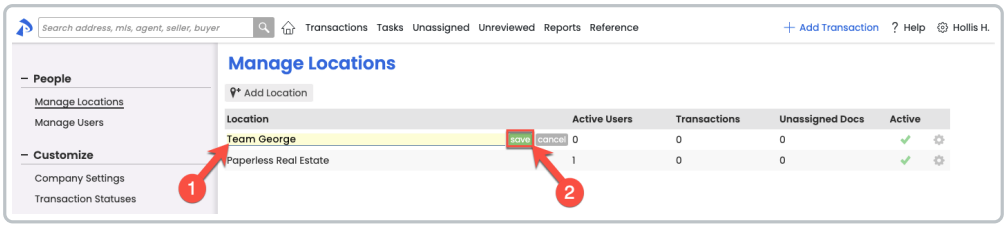
Edit a Location

To edit a *Location*:

1. **Go to the Manage Locations page →**
2. To the right of the *Location*, **click the gear and select [Edit Location].**



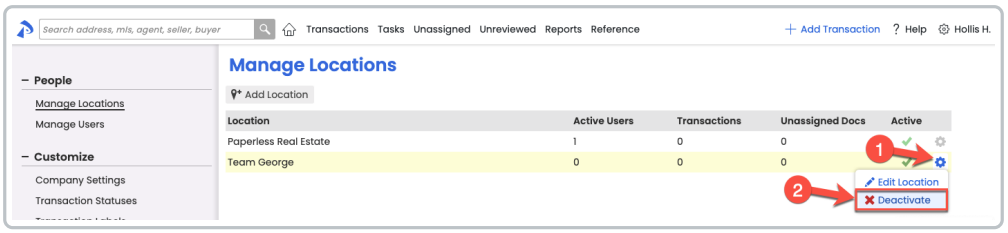
3. **Enter a new *Location* name.**
4. **Click [Save].** Your updated *Location* will now appear in the list.



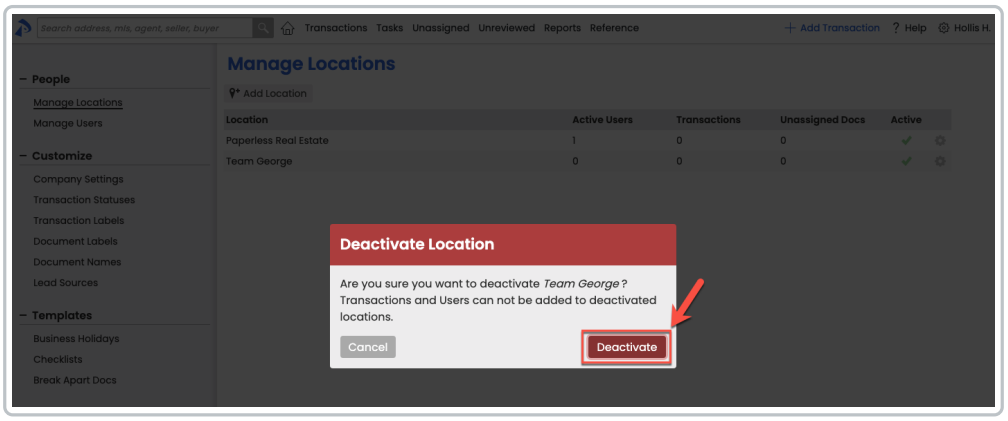
Deactivate a Location

To deactivate a *Location*:

1. **Go to the Manage Locations page →**
2. To the right of the *Location*, **click the gear and select [Deactivate Location].**



3. **Click [Deactivate] to confirm.**



Pipeline Pro Webinar Recording - Managing Teams

This webinar covers how to set up and maximize teams in Paperless Pipeline. Learn to separate transactions, users, permissions, visibility, and communications by teams to optimize and streamline your workflow.

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