

Managing Location-specific Admin

SUMMARY

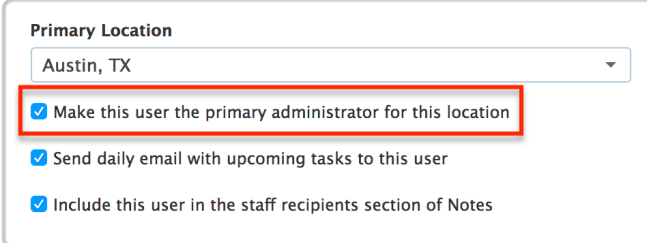
Define a primary admin for each of your locations for optimal communication with agents. All system-generated emails will be sent from this admin, giving agents the most appropriate go-to person to reply to. This article will show you how to set a location-specific admin.

 1:00

Managing Location-specific Admin

You can define a primary admin for each location. This improves communication between admins and agents. To set a user as a location admin:

- 1 Click your name in the upper right corner then "Admin / Settings".
- 2 Click [Manage Users] from the left menu.
- 3 Click the user's name.
- 4 Check the checkbox "Make this user the primary administrator for this location".
- 5 Click [Update User].

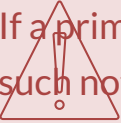


Primary Location

Austin, TX

- Make this user the primary administrator for this location
- Send daily email with upcoming tasks to this user
- Include this user in the staff recipients section of Notes

System-generated emails such as daily task reminders, expiration & closing notifications will now be sent from this admin giving agents the most appropriate go-to person for a reply.

 If a primary admin has not been specified for a location, Pipeline will send such notification emails from the Admin/Support Contact (or from the master admin if an Admin/Support contact has not been set).