

Feature Restrictions

This article covers different features in Lofty that are restricted to Epique agents. The most common reason is the scope of the setting is either Office or Company level, so enabling this feature for agents means they can impact the way other agents use the CRM. That impact is nearly always negative. While this can be frustrating, it's important for the overall Epique experience to avoid chaos and cleanup.

If the exception is marked as "None" the setting must never be changed to allow agents to modify.

Feature	Restriction Scope	Reason for Restriction	Exceptions	Alternative
Pipeline name	Agents cannot modify or hide	These are set at the company level and everyone sees the pipelines for the whole account. Too many opinions of what they should be and arranged creates chaos and interferes with other users.	None.	Use a tag to help organize leads.
Segment name	Agents cannot modify or hide	These are set at the company level and everyone sees the segments for the whole account. Too many opinions of what they should be and arranged creates chaos and interferes with other users.	Team Office owners (leaders) can create Office level segments exclusively for their team.	Use a tag to help organize leads.
Standard agent website	Very limited customization	Lofty restricts this for agents who don't prioritize personal branding	Upgrade to Full site paid for as an Epique benefit	Use the Full site upgrade.

Duplicate leads allowed	Agents cannot modify	Company level setting. If the lead was generated by more than one agent, the duplicate is allowed. This is because of the reality of more than one agent in a particular market and the likelihood of that lead being responsive to lead gen of more than one Epique agent.	None.	Agents can merge duplicates of leads they are assigned to but cannot merge with leads others are assigned to.

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