Get Files Out of an Archived Account

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An office wound down onto the Archive Plan and now somebody needs a file out of it. The records are all there — the only thing standing between you and them is who's allowed to sign in.

Introduction

The Archive Plan keeps a closed office's data online and read-only: every transaction, every document, every report, exactly as they were. Nothing new gets created, and nothing gets taken away.

There's one rule about it that surprises everybody eventually, and it's the reason most people end up reading this: **only master admins can log into an Archived account.** Agents can't, and it isn't a password problem. Resetting the password changes nothing, because it was never the password. If an agent tries, they get an error and no explanation.

So every route out of an Archived account runs through a master admin. This is what those routes are, and what to do when the master admin is somebody who left two years ago.

When to Use This

- An agent needs a document from a deal they closed at an office that has since wound down.
- One of your users is getting a login error on an Archived account and you can see they're an active user.
- You need the old office's contact list — names, emails, phone numbers — for something else.
- The person who set up the Archive Plan has left and nobody knows whose login still works.
- You've taken over an office's records and want the account in your own name rather than a departed colleague's.

> Putting an office *onto* the Archive Plan is a different job — see Wind Down an Office and Keep the Records Online. This one is for accounts already there.

1. Work Out Who the Master Admin Is

Start here, because nothing else is possible without it. The master admin on an Archived account is often not a person anymore — it's the company catch-all the office used, or the address of the broker who signed everything.

Ask around first: whoever handled the wind-down usually remembers. If nobody knows, or the people who would have known are gone, email us. We can tell you the master admin on record for the account, which is frequently the missing piece by itself.

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. Sign In on the Address on File

With the address identified, sign in as normal. If the password is long gone, reset it the ordinary way — a reset works fine for a master admin on an Archived account; it's only agents the plan turns away.

Forgot your password, want to change one you know, or need to reset one for an agent? Here's every way to get a password sorted.

See Password Reset

> A reset email goes to the address on the profile. If that mailbox no longer exists — a domain that lapsed when the company closed — say so when you contact us, because that changes what we need from you to help.

3. Email the Document Out From the Transaction

This is the everyday version of the job, and it's why the login rule matters. An agent needs one disclosure from a deal in 2021; they can't get in; you can. Open the transaction, attach the documents, and send them straight to whoever needs them from inside Pipeline.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

> Sending a lot at once? A whole transaction's documents can go out as a single Zip File link rather than a dozen attachments — easier for you, and easier for the person on the other end.

4. Download the Reports and the Contact List

Some of what people ask for isn't a document on a transaction. Contact details are the usual one — the escrow officer, the lender, the co-op agent from a deal nobody can quite remember.

Those come out as files rather than emails, and a master admin can pull them the same way they always could.

Every contact your office has ever added to a transaction, in one spreadsheet you can sort, share, or load into another tool.

See Contact Export

> Monthly backups aren't generated on the Archive Plan, so there's no fresh ZIP waiting for you each month the way there was on a full plan. What you want, you pull.

5. Take the Account Over Properly

If you're the one running these records now, don't keep working out of a departed colleague's login. Give yourself your own master admin profile and switch theirs off — the account then belongs to somebody who actually still works here, and the record of who did what stays honest.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

Then turn off the old one.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

> Want to keep using the *same* address — the company catch-all — on your new profile? Change the old profile's email address to something else first. Pipeline holds one profile per address, so the address has to be free before the new profile can claim it.