Wind Down an Office and Keep the Records Online

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The office is closing, but the records still have to be reachable for years. Winding down onto the Archive Plan keeps them online and searchable without keeping you on a full plan.

Introduction

Some offices don't leave Pipeline so much as stop using it. The broker retires, the doors close, the team moves on — and the transaction history still has to stand up to a regulator for years afterward. Paying a full transaction plan to store deals nobody is working is the wrong shape for that, and canceling outright throws away the thing you're obligated to keep.

The Archive Plan is the shape that fits: a low monthly rate, everything you had still online and searchable, nothing to download or maintain. This walks you through deciding whether you're really ready for it, closing out the work that needs an active plan first, and making the switch cleanly.

Read it before you act on it. The switch is permanent, and a few things have to happen while your account is still fully active.

When to Use This

- You're closing the brokerage at the end of the year, but your state makes you keep transaction records long after that.
- You've moved to another system and only need Pipeline now to look old deals up.
- You don't want to download and babysit backup files every month — you just want to search your history when someone asks.
- Your broker retired, nobody's writing new deals, and you're still paying for a full transaction plan.
- You want to pause the account for the off-season and pick it back up when things get busy.

> That last one is the common wrong turn, and it has a different answer — read the next section before you go further. If you're leaving Pipeline entirely and want the files on your own drive instead, see Get Your Files Out Before You Go.

Why This Is a One-Way Door

Plenty of offices ask to switch to Archive for a quiet stretch and switch back when business picks up. We don't permit that. The Archive Plan is built as long-term storage for companies who are genuinely done adding transactions, and once an account moves onto it, it doesn't move back to an active Transaction Plan. If there's any real chance you'll write another deal in Pipeline, this isn't your plan.

What you want instead is the bottom of the ladder. There's no pause or hold tier, but the lowest Transaction Plan costs little, keeps your data online, and — unlike Archive — lets you climb back up the moment you need to. Ride out the slow season down there and come back up when the deals return.

Deal flow moves in seasons. Your plan can move with it, and most of the savings are in the timing.

See Right-Size Your Plan to Your Season

1. Decide Whether You're Really Done Adding Transactions

Everything else follows from this one question, so answer it honestly and answer it with the people who'd know. Not "are we slowing down" — *will anyone need to create a transaction in Pipeline again?*

If the answer is no, or a firm not-for-years, Archive is right and the rest of this article applies. If the answer is maybe, stay on a Transaction Plan and pick the lowest rung instead. It's a cheap kind of optionality, and it's the only kind available here.

Pipeline bills on a simple monthly transaction plan — a ladder you move up or down as your deal volume changes.

See Transaction Plans

2. Finish the Work That Needs an Active Plan

A few things stop being available the day the switch lands, so do them now rather than discovering them later. The Commission Module is disabled on Archive and commission reports go with it — those are the ones offices miss most, because a wind-down is exactly when someone asks for a final year-end number.

Before you request the switch:

1. Run and save any commission reports you'll want later, including your final year-end figures.
2. Close out or finish any transaction that's still in progress, since you won't be able to create new ones afterward.
3. Upload anything still sitting on someone's desktop that belongs in a transaction file.

Commission documents you've already generated aren't affected — previously generated CDA docs stay right where they are, on each transaction, and you'll still be able to open them. It's the module and its reports that go away, not the paperwork they produced.

> Light editing survives the switch. You can still upload a document to an existing transaction on the Archive Plan — handy when a stray file turns up a month after you've closed. What you can't do is create a new transaction to put it in.

3. Tell the People Who Still Need Access

For security and privacy, only master admins can log in to an account on the Archive Plan. That's a real change and it lands on switch day: every agent, every transaction coordinator, every location admin who could sign in yesterday can't sign in tomorrow. From then on, any request for an old file comes through a master admin.

So give your team notice, and be specific about the date. Agents who want their own deals in hand should collect them while they still have a login — that's its own job, with its own timing, and it's worth pointing them at rather than explaining twice.

Closing your account doesn't have to mean losing the paperwork. Collect your backups while the account is still open, and the whole archive leaves with you.

See Get Your Files Out Before You Go

> Make sure more than one person can still reach the account. Once you're on Archive, the master admin login is the only way in — so if the only master admin is the person retiring, sort that out before the switch, not after.

4. Ask Us to Make the Switch

The switch is ours to make, not a setting you'll find in the account. Your master admin sends the request from their login email, and our Billing Team schedules it — usually for the business day before your next bill, so you're not paying for a plan you've finished with.

Archive pricing starts once your normal plan is canceled, and we handle that cancellation as part of the switch. It isn't a separate thing for you to do first.

The Archive Plan keeps your Pipeline data online and read-only for a low monthly rate, so you can step away from the service without leaving your records behind.

See Archive Plan

> Don't cancel your account and then ask to archive it. Canceling removes the account and its data from our systems — there's nothing left to archive, and getting it back means reinstating the account, if it's even still recoverable. Ask for the Archive Plan while your account is open and healthy, and we'll take care of the plan change for you.

5. Know How Long the Records Will Last

Once you're archived, the answer to "how long do we have this?" is "as long as you keep the plan" — there's no separate expiry running underneath it, and nothing gets purged on a schedule. That's the whole point of paying for it. Worth knowing the shape of the policy anyway, especially if your retention obligation has an end date and you're planning for the day you can finally let go.

How long does Pipeline keep your data? Here's what stays, what's recoverable, and for how long.

See Data Retention