Hand the Account to a New Owner After a Sale

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You've sold the company and the buyer is taking the Pipeline account with it. There's no ownership-transfer button — it's four moves in a particular order, and the order is what keeps anyone from getting locked out mid-handover.

Introduction

A sale changes two things about a Pipeline account, and offices reliably remember one and forget the other.

The first is **access**: who can reach every Location, every transaction, and the settings nobody else can touch. The second is **ownership**: whose card we charge, whose instructions we'll act on, and whose company name prints on the documents Pipeline generates. Handing over the first without the second leaves a new owner running a business that still says the old one's name on every CDA, and still bills the seller's card.

Everything below runs in order for one reason: only a master admin can do nearly all of it, and the person who is one today is on their way out. Do this while they can still sign in.

When to Use This

- You've sold your brokerage and the buyer is keeping the Pipeline account.
- You've bought an office and been given a login rather than an account.
- A franchise has changed hands and the new owners need to be on the account and on the bill.
- You're retiring and handing the company to a partner or a family member.
- The sale closed some time ago and we're still charging the previous owner's card.

> If the person leaving is an admin rather than the owner — the account's bill and company name aren't changing — you want the shorter job: Hand Off Master Admin When the Current One Is Leaving.

Why This Beats Handing Over the Login

The shortcut everybody considers is to give the buyer the outgoing owner's email and password and let them get on with it. It works for about a week, and then it doesn't — because that profile is still signed to everything the seller ever did, we'll still be talking to the seller when the account needs authorizing, and the buyer can't change the address on a profile they don't own without locking themselves out of it.

Worse, it leaves the seller holding the keys to a company they no longer own. Every step below takes minutes and ends with the account genuinely belonging to the person running it — their profile, their card, their name on the documents, and a clean record of who did what before and after the handover.

1. Agree What's Actually Being Sold

Two very different transactions get described the same way, so settle this first.

If the buyer is taking over *the company and its account* — same Pipeline account, new owner — this article is the whole job, and nothing moves anywhere.

If the buyer has their own Pipeline account and is buying *the deals*, that's a paid data move between two accounts, run by our Tech Team on a scheduled weekend. Different job, different article.

You bought an office and it already runs on Pipeline. A merge brings its Locations, its deals, and its people into your account with their history attached — and closes the account they came from.

See Merge Two Pipeline Accounts After an Acquisition

2. Add the New Owner as a User

If they're not already in the account, they need their own profile before you can give them anything — and their own profile is the whole point of doing this properly.

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

> You can do this well before the changeover date. Adding someone and giving them master admin doesn't disturb anything — the account keeps running normally until you're ready, and it means nobody is doing paperwork on the day.

3. Grant Them Master Admin

Only someone who already has master admin can grant it, and they do it from inside Pipeline — open the new owner's profile on Manage Users and turn it on under their account-wide permissions.

This is the step with a deadline on it. We can't grant master admin on our end for security reasons; it has to come from a master admin who is signed in. While the seller is still here, this takes a minute. After they've gone, the account has nobody left who can promote anyone, and you're into establishing ownership with documents.

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

4. Put the New Owner's Card on the Account

Now the bill can change hands, and it goes in the buyer's own hands for the obvious reason: it's their card. Any master admin can update the card on file, which is exactly why master admin had to come first — the buyer needs it before they can enter their own details.

They'll find it under Admin / Settings, and the new card replaces the old one. From the next bill onward, we charge them.

Pipeline keeps one credit card on file and charges it automatically each billing cycle — update it anytime from your account settings.

See Credit Card on File

> Don't leave this one to "after closing". Until the card changes, we are charging the seller for a business they no longer own — and there's no way to pause billing on an active account while you sort it out.

5. Update the Company's Identity

This is the half that gets forgotten, and it's the half your agents and your title companies actually see. Work down it in one sitting.

Set the company name and brokerage license number that identify your account throughout Pipeline.

See Company Name & License

Your brand lives in a handful of places in Pipeline — your company settings, your locations, and your team's email signatures. Here's each one, in the order to update it.

See Rebrand Your Company Across Pipeline

One field isn't yours to edit: the **Legal Company Owner** on the account. Email us with the new owner's name and we'll set it.

> If you run the Commission Module, check the CDA before the first closing under new ownership — you set the signature and the name commissions are payable to per office, and a title company reading last month's name is a phone call you'd rather not have. See Commission & CDA Settings.

6. Stand the Previous Owner Down

Last, and only once everything above is done and confirmed working. Remove master admin from the outgoing owner, then deactivate them and anyone else leaving with them. Their transactions, documents, and commission history stay exactly where they are — deactivation ends access, not work.

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

See User Deactivation

> Check the scanners first. Maildrop addresses belong to a user's profile, so taking away a departing person's upload permissions kills any maildrop tied to them — and the office copier that has been emailing documents into Pipeline for six years quietly stops. Find out what's programmed where before you switch anyone off, and re-point it at a profile that's staying.