Account Merge

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Two brokerages, two Pipeline accounts, one company now. An Account Merge brings every Location across and leaves you running on one.

Introduction

Two brokerages become one company, and both of them already run on Paperless Pipeline. That leaves you with two accounts, two bills, and two places to look for a file. An Account Merge ends that: everything in one account moves into the other, and you come out running on a single account.

It's the largest of the account changes Pipeline handles, and the one offices reach for after an acquisition, a merger, an ownership sale, or a franchise restructuring. There's no button for it, and that's deliberate. A merge rearranges two live accounts at the same time, and the changes it makes are the kind you can't click back, so our Tech Team does the work by hand instead.

The agents coming across don't rebuild anything and don't lose what they've already closed, and one account carries both companies' history from there on. If you're weighing this against the smaller moves, one question sorts it: how much of the other account is leaving? If everything is going and that account is winding down, an Account Merge is the one you want. If it's keeping some of its offices, that's a Location Transfer, and if nothing is leaving your account at all, you're looking for a Location Merge.

How It Works

You tell us which two accounts are involved, both master admins authorize it, and our Tech Team runs the merge on a scheduled weekend.

What Moves

Every Location in the source account, and everything filed under each one — all of its transactions, and all of its users. We recreate each Location on the destination side, so there's no manual setup waiting for you.

Your People Keep Their Logins

Moved users sign in with the **same email address and password they already have** — we don't create new credentials for anyone. After the merge they land in your account, with their transactions in their Location, reachable exactly like any other.

What It Costs

The fee follows how many Locations are actually moving, so we quote a merge once we've looked at both accounts and know the scope. Both accounts have to be active paid accounts for the merge to go ahead at all. Ask us for a figure before you commit to anything.

The Old Account Gets Closed

An account can't sit at zero Locations. Once the last one has moved, we cancel the source account — a merge ends in a cancellation by design. See Account Cancellation.

It's a One-Way Move

After the merge, the data lives in the destination account only. Nothing stays behind in the source, and there's no reversing it — which is why we ask for authorization from both sides in writing before anything runs.

Who Has to Authorize It

Three separate confirmations, and we can't start without all of them:

- The master admin of the account being **merged away**, confirming its data may leave.
- The master admin of the **destination** account, confirming it may arrive.
- The master admin of the account being **charged**, authorizing the fee.

Each one has to come from that person's own master-admin email address — the exact address on their profile. Once the merge is underway, we deal only with the master admin who authorized it.

When Their Agents Already Have Pipeline Profiles

This is the wall most acquisitions hit. A Pipeline email address can only belong to one profile, so you can't re-add agents from the brokerage you just bought under the emails they already use — Pipeline tells you the address is taken.

A merge is the way through it. Rather than re-creating those people as new users, it migrates the existing profiles and their transaction history into your account, and they keep signing in with the credentials they already have.

What You Can Bring Along

The transaction and user data always moves. A few things are optional, and worth deciding before we start:

- **Checklist templates**: checklists are tied to a home Location, so our Tech Team can bring your templates across for **a little extra**, which we'll fold into your quote. They arrive named with a `Transferred -` prefix, which you're free to edit off or delete.
- **Standardized Document Names** and **Transaction Labels**: we can copy either or both. These are additive — they land in the destination and also stay in the source.
- **Commission settings**: CDA documents and financial settings ride along with their Location, but only if *both* accounts have the Commission Module. If the destination doesn't have it, that configuration doesn't survive the move.

Anything you don't ask for doesn't get copied. Email templates come across as part of their Location's move — we can't transfer them on their own.

> Prefer to handle checklists yourself? You can download your checklist templates as a CSV and bulk-add them to the destination account instead, at no charge.

Fewer Locations, Smaller Bill

The cost follows how many Locations move, so the shape of the source account decides the price. If that account has several thin Locations all heading into yours, combining them first means fewer to move.

Two of your offices are becoming one. Our Tech Team can move a Location's transactions into another one in bulk, so nobody re-files them a hundred at a time.

See Location Merge

Request an Account Merge

> Tell us the two accounts and which one to bill. We'll review them, quote the merge, and send the transfer form.

> **Who Can Do This**: A master admin, using their own master-admin email address.

To request an Account Merge:

1. Email help@paperlesspipeline.com from your master-admin address. Name the account being merged, the account it's merging into, and which one to charge.
2. Complete the transfer form we send back. One master admin fills it out — it collects the details and the prep instructions for both sides.
3. Have the master admin on **each** account email us their written authorization, and the master admin of the account being billed authorize the fee.
4. Send us a **Full Spreadsheet** download from each account involved, so we can verify everything landed. Get it from the Transactions page under [Downloads].
5. Tell us whether you want checklist templates, Standardized Document Names, or Transaction Labels brought across.

Once we've reviewed both accounts we'll confirm the fee, verify the authorizations, and schedule the merge for a weekend. Afterward you'll have one account holding everything, your new people signing in as they always have, and the account you merged out of closed.

Account Merge FAQ

A merge moves every Location, needs both master admins to authorize it, and ends with the old account closed. Answers to the common questions about cost, your agents' logins, and what happens to the account you left. See

Account Merge FAQ.