

Location Merge FAQ

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Merging Locations moves one office's transactions into another inside your account, and it's usually the first step in closing an office down. Answers to the common questions about cost, your agents, and doing it yourself.

Can I merge two Locations myself?

One transaction at a time, yes — in bulk, no. You can open any transaction and change its Location whenever you like. There's no button that moves them all at once, so once the count gets past a handful, our Tech Team does it for you.

What does a Location Merge cost?

There's a fee, based on how many Locations you're merging. It drops for each additional Location we handle in the same session, so if you're consolidating several offices, tell us about all of them at once — doing it in one go costs far less than coming back to us one at a time. We'll get you a figure once we know what's moving.

Do my agents move to the new Location too?

No — that part's yours, and it's quick. The merge moves transactions. You can reassign agents to their new Location from their own profiles. See [User Profile](#).

Do the transactions keep their history?

Yes — they're re-filed, not re-created. A merged transaction keeps everything it had; it just lives under a different Location afterward.

Do I have to merge before I can close a Location?

You have to empty it, and merging is how. A Location can't be closed while anything is still filed under it — it needs no users, no transactions, and no unassigned docs left. Merging the transactions out is usually the biggest part of clearing it. See [Location Deactivation](#).

Can I delete a Location myself once it's empty?

No — send us a request from your master admin. Locations can't be removed from inside Pipeline. Once it's cleared out, your master admin asks us and we'll close it.

How is this different from a Location Transfer?

A merge stays inside your account; a transfer leaves it. Merging combines two of your own Locations, and only your master admin has to authorize it. A [Location Transfer](#) moves a Location to a completely different Pipeline account, needs the master admins on both accounts to authorize it, and costs more.

Who has to authorize a merge?

Your master admin. Only one account is involved, so we only need the one authorization — unlike a transfer, where both sides have to sign off.

Learn More

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](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
