

Location Merge

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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.

Introduction

An office closes, a team folds back into the main branch, or a Location gets created that nobody ends up needing. Whatever the reason, you're left with a Location you'd like to shut down and a pile of transactions still filed under it.

That pile is the whole problem: a Location has to be empty before we can close it, so its transactions have to land somewhere first. A Location Merge is that step. The transactions filed under one Location move across to another Location in the same account, and the first one comes out empty. There's no self-serve way to do this in bulk, which is the part that catches people out, so for anything past a handful our Tech Team runs the move for you.

Everything ends up under one office, the Location you're retiring is finally empty enough to close, and you skip the afternoon you'd otherwise spend reopening transactions one at a time to change a single field. If you're only moving a few transactions, doing it yourself is genuinely quicker, so it's worth working out which side of that line you're on before you ask us to run it.

How It Works

You tell us which Location is emptying out and where its transactions should land, your master admin authorizes it, and our Tech Team moves them.

What Moves

The transactions filed under the Location you're merging away. They keep their history — they're re-filed, not re-created.

What It Costs

There's a fee, and it's based on how many Locations you're merging — it drops for each additional Location we handle in the same session. So tell us about all of them at once: consolidating several offices 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.

What Happens to Your Agents

Users aren't part of the transaction move, so reassign agents to their new Location yourself from their profiles. See [User Profile](#).

Who Has to Authorize It

Your account's [master admin](#). Only one account is involved, so we only need the one authorization.

Doing It Yourself

If only a few transactions are moving, you don't need us. Open each one and change its Location — see [Transaction Details](#). The Tech Team merge exists for when doing that by hand stops being realistic.

Empty a Location Before You Close It

This is what most Location Merges are really for. We can't close a Location while anything is still filed under it — before we can deactivate one, it has to have **no users, no transactions, and no unassigned docs** left in it. You can't remove a Location from inside Pipeline on your own either; closing one is a master-admin request to us.

So the usual order is: merge the transactions into the Location that's staying, move the agents over, clear anything unassigned, then ask us to close the empty one.

Deactivate a Location you no longer use to keep your Locations list focused on the offices and teams you're actively running.

See [Location Deactivation](#)

Planning a [Location Transfer](#) or an [Account Merge](#)? We price those per Location, so merging thin Locations together first means fewer to move — and a smaller bill.

Request a Location Merge

Tell us which Location is emptying and which one its transactions should join. We'll confirm the fee and schedule it.

Who Can Do This: The account's master admin.

To request a Location Merge:

1. Email help@paperlesspipeline.com from your master-admin address.
2. Name the Location whose transactions are moving, and the Location they should move into. List every Location you want merged in this round — handling them together costs less than coming back to us one at a time.
3. Confirm you'd like us to go ahead, and authorize the fee.

We'll confirm the total and schedule the move. Once it's done, the Location you merged away is empty, and we can close it whenever you ask.

Location Merge FAQ

Merging Locations is a Tech Team service, priced per Location, and usually the first step in closing an office. Answers to the common questions about cost, what happens to your agents, and doing it yourself. See [Location Merge FAQ](#).
