Location Transfer FAQ

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A Location Transfer moves one office into a different Pipeline account, transactions and people included. Our Tech Team runs it once both master admins authorize it. Answers to the common questions about cost, logins, timing, and what comes across.

What does a Location Transfer cost?

There's a fee, and it's based on how many Locations are moving. Tell us what's going where and we'll get you a figure once we know the scope. It's charged to the card on file for whichever account you tell us to bill, and bringing your checklist templates across adds a little more.

Will my agents have to set up new logins?

No — they keep the email address and password they already use. We don't create new credentials for anyone. After the move they sign in exactly as before and land in the destination account, with their transactions in a new Location there.

Who has to approve a transfer?

The master admin on both accounts, plus whoever's paying. We need written authorization from the master admin of the account the Location is leaving, the master admin of the account it's going to, and the master admin of the account being charged. Each has to come from that person's own master-admin email address.

Does anything stay behind in the old account?

No — it's a one-way move. Once the transfer runs, the Location and its data exist only in the destination account. That's why we ask both sides to confirm in writing first: there's no undo.

Do our checklist templates come with the Location?

For a little extra, yes — or you can move them yourself at no charge. Checklists are tied to a home Location, so our Tech Team can bring your templates across; they arrive with a `Transferred -` prefix on the name that you're welcome to edit off. If you'd rather not pay for it, download your templates as a CSV and bulk-add them to the destination account.

Can I move just some of a Location's transactions?

No — a transfer moves the whole Location. If you only need a handful of files in the other account, download each transaction on its own (the download includes its notes, checklists, emails, activity history, and documents) and re-create them there. A Transaction Spreadsheet import is another route, but it doesn't carry documents.

Do both accounts have to be paying customers?

Yes — both need to be active paid accounts. If the destination is brand new, get it started on a plan before we schedule the move.

How long does it take?

It runs on a scheduled weekend once we have everything. The clock starts when both authorizations are verified and your transfer form and Full Spreadsheet are in — then our Tech Team books the move and confirms the date with you.

Can we make it cheaper?

Yes — move fewer Locations. The fee is per Location, so if several thin Locations are all heading to the same account, combining them first means fewer to transfer. See Location Merge.

Learn More

An office is moving to a different Pipeline account. A Location Transfer brings the whole thing across: every transaction, every user, logins and all, so nobody rebuilds a thing.

See Location Transfer

Still Have Questions?

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