Location Transfer

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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.

Introduction

An office changes hands. A franchise splits off on its own. One brokerage buys another and the agents need to land somewhere with their deals still attached. In each case a whole Location has to leave one Pipeline account and turn up, intact, in a different one.

That's a Location Transfer, and it's a hands-on service rather than a setting. Our Tech Team runs it, because it reaches into two live accounts at once and rebuilds the Location on the far side. It's also a move and not a copy, which is the part people most often arrive not knowing: a Location doesn't end up living in both accounts.

The transactions come across with their history, the people come across as themselves, and nobody spends a month rebuilding an office by hand in a new account. If you're not sure this is the move you need, one question sorts it: how much of the old account is leaving? If it's keeping its other offices, a Location Transfer is right. If it's handing over everything and closing, that's an Account Merge, and if nothing is leaving the account at all, you want a Location Merge.

How It Works

You tell us what's moving and where, both master admins put it in writing, and our Tech Team runs the move on a scheduled weekend.

What Moves

The Location and everything filed under it: all of its transactions, and all of its users. Agents whose primary Location is the one moving come across automatically.

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. After the move they land in the destination account, with their transactions in a new Location there, reachable exactly like any other.

What It Costs

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. We charge it to the card on file for whichever account you tell us to bill, and both accounts have to be active paid accounts for the transfer to happen at all.

It's a One-Way Move

After the transfer, the Location and its data live 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 **source** account, confirming the Location 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 transfer is underway, we deal only with the master admin who authorized it.

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. If the source account's only Location is the one moving, its checklists come with it.
- **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 the Location, but only if *both* accounts have the Commission Module.

Anything you don't ask for doesn't get copied. Email templates come across as part of the Location's transfer — 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.

Bring the Bill Down Before You Move

The fee is per Location, so the shape of your account decides the price. If your transactions are spread across several thin Locations that are all heading to the same place, consolidating them first means fewer Locations to transfer — see Location Merge.

And if you're only moving a handful of transactions, a transfer may be more than you need. You can download each transaction on its own — the download brings its info, notes, checklists, emails, activity history, and documents — and re-create them by hand. See Individual Transaction Downloads.

> A Transaction Spreadsheet import moves transaction records but **not documents**. If you go the do-it-yourself route, plan to move the files separately.

Request a Location Transfer

> Tell us which Location is moving, where it's going, and which account to bill. We'll send you the transfer form and confirm what's needed.

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

To request a Location Transfer:

1. Email help@paperlesspipeline.com from your master-admin address. Name the Location that's moving, the account it's leaving, the account it's going to, and which account 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 once we've quoted it.
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 verified the authorizations, our Tech Team schedules the move for a weekend and confirms the date with you. After it runs, the Location and its people are live in the destination account and gone from the source.

Location Transfer FAQ

Transfers are master-admin authorized on both sides, priced per Location, and permanent once they run. Answers to the common questions about cost, timing, what comes across, and what your agents will see. See Location Transfer FAQ.