Merge Two Office Locations Into One

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Two of your offices are becoming one. Consolidating them inside Pipeline is a handful of steps in a particular order — and getting the order right is what keeps your checklists from quietly stopping.

Introduction

Locations are how one Pipeline account keeps its offices apart: separate transactions, separate users, separate permissions and reporting. When two offices merge, or a team folds back into the main branch, or a Location turns out not to be needed, you end up wanting the two to become one.

There's no button for it. You can change a single transaction's Location yourself, and for a few deals that's the whole job. Past a handful, our Tech Team moves them in bulk for you. What this article adds around that is the sequence: the things that have to be re-pointed *before* the transactions move, the part of the job that stays yours, and what to do with the Location once it's empty.

When to Use This

- Two branches are consolidating into one office and you don't want two entries on every report.
- A team you set up as its own Location has dissolved back into the main office.
- You created a Location by mistake, or set up more of them than you turned out to need.
- A transaction coordinator has left and their Location should fold into whoever picked up the work.
- You're being quoted per Location for a transfer or a merge and want to reduce the count first.

Why This Beats Renaming the Location

The quick instinct is to rename one Location to the other's name and call them merged. Renaming does work the way you'd hope — the new name updates across every transaction filed under it, closed ones included — but it doesn't combine anything. You end up with two Locations that sound alike and still hold their own transactions, their own users, and their own checklist templates. Pipeline won't even let both carry the same name.

Merging is the move that actually leaves you with one office: the transactions are re-filed rather than re-created, so they keep their history, and the Location they came from ends up empty and ready to close. Renaming is the last step of that, not a substitute for it — once everything is in one place, call it whatever the office is called now.

1. Decide Which Location Survives

Everything else here re-points at one Location, so choose it first. Usually it's the one with more attached to it — more transactions, more agents, the checklist templates you actually use — because that's the least to move.

Consolidating three or four offices at once? Name all of them now rather than coming back to us one at a time. The fee is per Location and it drops for each additional one handled in the same session, so a single round costs far less than four.

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

2. Re-point the Checklist Templates First

This is the step that gets skipped, and it's the one that bites. Checklist templates belong to a Location. A template assigned to the office you're closing stops reaching the transactions that just left it — so the day after a merge, checklists that used to apply automatically don't.

Open each template on the closing Location and either add the surviving Location to it or move it across. Do it before the transactions move, so there's no gap where a new deal comes in with no checklist attached.

Build a checklist once as a template, then let Pipeline apply it to every transaction that needs it.

See Checklist Templates

> If both offices were running near-identical templates, this is a good moment to keep one and retire the other rather than carrying two copies into the merged office.

3. Move the Transactions

With the checklists pointing at the right place, the transactions can move. A transaction's Location is a field on the transaction, so if you're only moving a few, open each one and change it — that's the entire job, no request needed.

Beyond a handful it stops being realistic, and that's what the Tech Team merge is for. Tell us which Location is emptying and which one its transactions should join, and we move them in bulk. They're re-filed, not re-created, so nothing about their history changes. We schedule larger consolidations on a weekend during off-peak hours.

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.

See Location Merge FAQ

4. Move the Agents

Users aren't part of the transaction move, and this catches people out — the deals arrive in the surviving Location and the people are still filed under an office that no longer has anything in it.

Each person's primary Location lives on their profile, so you can reassign them yourself from Manage Users. Check their permissions while you're in there: a location admin who ran the closing office needs their access pointed at the new one, or they'll find themselves able to see less than they did yesterday.

A user's profile holds who they are and where they work — their name, role, primary location, and license number.

See User Profile

> A whole roster to move? Send us your user list with the new Location named against each person and we can bulk-update them alongside the transaction move, rather than you opening sixty profiles.

5. Clear What's Left Behind

Before we can close a Location it has to be genuinely empty — no users, no transactions, and no unassigned docs. That last one is the usual straggler, because documents emailed in sit in the Unassigned queue against the Location they arrived at, not against a transaction.

Open the queue, file what belongs on a transaction, and delete what doesn't.

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

6. Close or Deactivate the Empty Location

Now decide whether the old office disappears or just steps aside. Most offices deactivate: the Location stops appearing where new work gets filed, and everything that ever happened under it stays exactly as it was.

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

If you'd rather it were gone altogether, a master admin can ask us to remove it. You can't delete a Location from inside Pipeline, and we'll only remove one that's already empty — which is why this step is last.

> Planning a Location Transfer or an Account Merge next? We price those per Location, so consolidating thin ones first means fewer to move and a smaller quote.