Merge Two Pipeline Accounts After an Acquisition

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You bought an office and it already runs on Pipeline. A merge brings its Locations, its deals, and its people into your account with their history attached — and closes the account they came from.

Introduction

An Account Merge is the acquisition move. Everything in the other company's account comes across to yours, and when the last Location has moved, we cancel that account. An account can't sit at zero Locations, so a merge ends in a closure by design.

That's the fact to hold onto through everything below, because it changes the order of the work. This isn't a copy you can compare afterward. When the weekend is over, the only place those records exist is your account, and the old one is gone.

Our Tech Team runs it by hand, on a scheduled weekend, once both master admins have put it in writing. What you do beforehand is decide what should come across, get both sides' authorizations in, and take a copy of what's being closed.

When to Use This

- Your office bought another office that's already on Pipeline, and you don't want to re-add sixty people from scratch.
- Two brokerages are merging into one company and each has its own Pipeline account.
- You tried adding the acquired agents to your account and Pipeline told you their email addresses were already in use.
- An owner is selling and the buying company wants the transaction history, not just the paperwork.
- You're consolidating so there's one bill and one place to run reports instead of two of everything.

> If the other account is keeping some of its offices and only handing over one, that's a Location Transfer, not a merge — nothing gets canceled. See Move an Office to a Different Pipeline Account.

Why This Beats Re-Adding Their Agents

The instinct after an acquisition is to treat it as onboarding: send us the new roster, add everyone, and let the old account lapse. It runs into a wall on the first name. A Pipeline email address belongs to one active profile at a time, and every one of those agents already has a profile — at the company you just bought. Pipeline tells you the address is taken, and there's no way to type past it.

A merge is what gets through that wall. Rather than creating those people again, it moves the profiles they already have, with their transaction history attached, into your account — so they sign in on Monday with the same email and the same password, and their deals are where they left them. The alternative is a roster of people with new addresses they don't use, and years of closed files stranded in an account nobody is paying for.

1. Confirm a Merge Is What You Want

Two questions sort it, and they're worth asking out loud before anyone signs anything. Is anything leaving the other account at all? If not, you're looking at a Location Merge inside one account. If yes — is that account keeping any of its other offices? If it is, it's a Location Transfer. If it's handing over everything, it's a merge, and the account closes at the end.

Two brokerages, two Pipeline accounts, one company now. An Account Merge brings every Location across and leaves you running on one.

See Account Merge

2. Ask Us for the Questionnaire and Send It Back Early

Email us from your master-admin address and say what you're planning. We'll send a short questionnaire that gathers which two accounts are involved, what's moving, and what should ride along with it.

Send it back as soon as you have the answers, even if the other side hasn't authorized yet. Nothing runs until both parties have confirmed, so an early questionnaire only shortens the wait — and a merge needs about a week of lead time to schedule once everything's in.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help

3. Get Both Master Admins to Authorize in Writing

Three confirmations, and we can't start without all of them: the master admin of the account being merged away, confirming its data may leave; the master admin of your account, confirming it may arrive; and whoever is authorizing the charge, confirming which card we bill. Each has to come from that person's own master-admin address.

Get this moving early in the deal, not after closing. The person who has to send the first of those three is the one selling you the company, and they're usually easier to reach the week before the handover than the week after.

A merge moves every Location out of one Pipeline account and into another, and closes the one you left. Answers to the common questions about cost, your agents' logins, duplicate email addresses, and what happens to the old account.

See Account Merge FAQ

4. Prepare Both Accounts

Three pieces of housekeeping make the difference between a merge that lands cleanly and one that gets pushed a week.

Clear the unassigned docs in the account that's moving. Documents that haven't been filed onto a transaction have nothing to travel with, so work that queue down to empty first.

Decide what rides along besides the transactions and the users. Statuses, transaction labels, checklist templates, agent fees, and deductions don't come across on their own — ask for the ones you want. Commission and CDA settings travel with a Location, but only if both accounts run the Commission Module.

And send us a full transaction spreadsheet from your account, the one receiving everything. We pull the other side's list ourselves; yours is what we reconcile against so nothing is double-counted or missed.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

5. Download a Backup of the Account Being Closed

We cancel the account you're merging in at the end of this, and Pipeline removes a canceled account's data. Download whatever you want to hold independently of the merge while that account is still open.

Pull its most recent monthly backup — and open it, rather than trusting a file size. It costs nothing and it's the only copy that survives outside your account.

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

> Missing months from before you were involved? We can re-generate past backups on request while that account is still open. See Order Backups for Months You Never Downloaded.

6. Run the Weekend

We schedule the merge for a weekend, during off-peak hours, and tell you the window in advance. Everyone should stay out of the account being merged in while it runs — expect it to be unavailable for a few hours. Your account stays up throughout; there's no downtime on the receiving side.

When it's done, each Location from the other account lives in yours, with its transactions and its people. Agents whose primary Location moved come with it, the ones who'd already been deactivated included, and everyone keeps the login they had.

7. Settle the Combined Account

What arrives shows up as its own Location, which turns out to be the most useful thing about a merge: the two companies stay readable as two companies for as long as you want them to. Run reports on either side, keep permissions scoped per office, and let the acquired agents work where they've always worked.

When you're ready to stop treating them as separate — or once the last live deal in that Location has closed — you can fold it into an existing office or switch it off, and the transactions stay searchable either way.

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

> One thing to check that week: your combined transaction volume is now on one plan. If the merged account is creating noticeably more transactions a month than yours was, move up a tier before the next bill rather than after. See Transaction Plans.