Move Your Transactions When You Change Brokerages

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You're moving to a new brokerage and years of closed deals are sitting in your old company's Pipeline account. Here's what can actually come with you, and how to have it in hand before your access ends.

Introduction

Start with the honest answer: usually your files stay with the brokerage. The transactions live in that company's account, they're that company's records, and there's no button anywhere that lifts one agent's deals out of one account and drops them into another.

Our Tech Team can run a paid move, and it exists for exactly this situation — but it depends on a condition that's rarely true for a single agent, and it needs your old broker to say yes. This walks through that condition first, because if you happen to meet it you'll want to know. Then it walks the path that works regardless: taking your records offline while you can still log in, and standing them back up in your new account.

Whichever route you're on, the clock matters more than anything else here. Everything below is easy while you still have access and very hard afterward.

When to Use This

- You've given notice and you want your closed files before your login is switched off.
- Your new brokerage also uses Pipeline and you assumed your deals would follow you over.
- Your old company was acquired and you're being told the account is going away.
- You need your own copies for your records, your state's retention rules, or your taxes.
- You already lost access and you're trying to work out who to ask.

> If you're the admin on the *other* side of this — the one making sure a departing agent leaves with what they should — start from Get an Agent's Files Offline Before They Leave instead.

Why This Beats Waiting to Ask Later

The natural order feels like: finish at the old place, start at the new place, then sort the paperwork out once things settle. It's the one order that doesn't work. The moment your profile is switched off, everything below stops being something you can do and becomes a favour you have to ask a former employer for — and they're under no obligation to spend an afternoon on it.

Every route out of an old account runs through someone who can log into it. While that's you, this is an evening's work. After that, it's a phone call to a broker you no longer work for.

1. Check Whether a Paid Move Applies to You

A cross-account move is possible, and it's worth two minutes to see whether you qualify, because if you do it's by far the best outcome — the transactions arrive intact, with their history.

All of these have to be true at once. In the old account, you and every transaction of yours sit alone in a single Location, with no other users and no other transactions in it. Both the old and the new account are active paid accounts. The master admin on each side authorizes the move in writing. And there's a fee for the manual work, quoted once we've looked at both accounts.

The Location condition is the one that usually settles it. Most brokerages file everyone's deals together in an office Location, and a shared Location can't be split — which means for a single agent the answer is normally no.

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

> If you're moving with a whole team or an office rather than on your own, the odds change completely — that's a normal Location Transfer. See Move an Office to a Different Pipeline Account.

2. Ask Your Old Brokerage While You Still Have Access

Even where a move qualifies, it isn't your call to make. The transactions belong to the account they're in, so the authorization has to come from that account's master admin, from their own address. Either side's master admin can open the request with us, but the old account's has to agree either way.

Ask early and ask plainly: you'd like your transactions moved to your new brokerage's account, you understand there's a fee, and you'd like to know who'd be paying it. A no is useful too — it tells you to start on the steps below today rather than next month.

3. Take Your Documents Offline

This is the part that always works, and it's the part to do first. From inside each transaction you can email yourself its entire document set as a single Zip File link, and attach the coversheet so the deal's details come with the paperwork.

It's one transaction at a time — there's no bulk export of every deal at once — so work a list, oldest first, and let the emails land in a folder you've set aside.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

> Only a few open deals to worry about? Then this step plus the next two *is* the answer, and it's the one we'd recommend even if a paid move were available — re-creating a handful of live transactions by hand costs an afternoon rather than a quote.

4. Download a Transaction Spreadsheet

Documents are half of a transaction. The other half is everything typed into it — addresses, dates, prices, agents, statuses — and that comes out as a spreadsheet you shape first and download once.

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. Re-create the Transactions in the New Account

With the spreadsheet in hand, your new brokerage's admin can load the deals into their account rather than retyping them, then you attach the documents you saved in step 3.

Bring a back catalog of deals in from another system with a spreadsheet, up to 50 transactions at a time.

See External Transaction Imports

> An import never carries documents — it brings the transaction records only. The paperwork always goes on separately, from the Zip Files you emailed yourself. Plan for that rather than discovering it after the import.

> Loading a stack of past deals into an account can bump against its monthly transaction quota. There's a way around that in the first month of a new account, and a way around it after. See Load Your Back Catalog Without Buying a Bigger Plan.

6. Sort Out Your Login

One last thing, and it surprises people on their first day at the new brokerage: a Pipeline email address belongs to one profile at a time. If your new office tries to add you under the address you've always used, Pipeline tells them it's taken — because your old profile still has it.

Your same email address can follow you to your new brokerage — it just has to be released from the old one first, and you're the only person who can ask for that.

See Keep Your Email Address When You Change Brokerages

> Releasing the address means your old profile is switched off, and with it your access to the old account. Finish steps 3 and 4 first.