Move an Office to a Different Pipeline Account

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A branch is changing hands, a franchise is going independent, or one brokerage just bought another. A Location Transfer carries that office into the other account whole — but what you do *before* the transfer decides how much of it comes across, and what it costs.

Introduction

This is the path for an office that's leaving your account while the rest of your account carries on. Our Tech Team runs the move for you, on a scheduled weekend, once both sides have put it in writing.

Two facts shape everything below. The first is that a **Location** is the unit that moves, not a transaction, not an agent, not a date range. Whatever is going has to be sitting in one Location before we can move it. The second is that this is a move, not a copy: once it's done, the data lives in the destination account only, and there's no undo.

So the work is mostly preparation. Get the shape right first and the transfer itself is a weekend you sleep through.

When to Use This

- You're selling a branch, or a branch is buying itself out, and the agents need their files to land with them.
- A franchise is leaving your brokerage to run on its own Pipeline account.
- You bought an office and its agents' history needs to end up in your account, but the seller's account is staying open for their other offices.
- Your account is splitting in two and each side has to keep its own transactions.
- You've been told a transfer isn't possible because the transactions are scattered across several Locations, and you want to know what to do about that.

> Not sure this is the right one? If the source account is handing over *everything* and closing, that's an Account Merge. If nothing is leaving your account at all and you're just folding two of your own offices together, that's a Location Merge. Both are linked from the steps below.

Why This Beats Rebuilding in the New Account

The instinct, when a quote lands, is to wonder whether it would be cheaper to just re-enter everything. For a handful of open deals, it sometimes is — and we'll say so. For an office with years of closed files behind it, it isn't, and the reason isn't the typing. Re-created transactions have no history: no activity log, no record of who reviewed what and when, no original upload dates. The paperwork survives, the evidence doesn't. For anyone who may have to answer to an auditor about a deal from three years ago, that difference is the whole point of having the files.

A transfer moves the records intact, and it moves the people with them. Your agents keep the login they already use, and their transactions are waiting for them the Monday after — which is a very different first week than handing sixty people a new password and a spreadsheet.

1. Get Everything That's Moving Into One Location

This is the step the whole transfer stands on, and it's where most of the delay happens. We move a Location and everything filed under it. If the office that's leaving has its transactions spread across two Locations, or shares a Location with agents who are staying, there's nothing clean to lift out.

It's also the price lever. We charge the fee per Location, so consolidating three thin Locations into one before the move costs less than moving three.

You have two ways to get there. If the transactions that are leaving are already grouped and it's just the Location boundaries that are wrong, our Tech Team can merge Locations for you. If they're mixed in with transactions that are staying, create a Location for the move and put only what's going into it.

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

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location

> Everything in the Location goes, whatever state it's in — active, pending, closed, fell through. We can't move a subset by status, and we can't change a transaction's status on the way across. If some of those deals should stay behind, move them out of the Location before the transfer, not after.

2. Clear the Location's Unassigned Docs

Documents sitting in the Unassigned queue don't belong to a transaction yet, so there's nothing for them to travel with. We can't transfer a Location that's still holding unassigned docs, and this is the single most common reason a scheduled move gets pushed a week.

Work the queue down to empty before you send us the form: file what belongs on a transaction, delete what doesn't.

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See Doc Assignment

3. Decide What Rides Along Besides the Transactions

The transactions and the users always come. A few things are optional, and deciding them now is what lets us quote the whole job at once instead of coming back to you.

Checklist templates are the one that catches people, because checklists belong to a home Location — they don't follow automatically. We can copy standardized document names and transaction labels across as well. Commission and CDA settings travel with the Location, but only if both accounts run the Commission Module.

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

> Anything you don't ask for doesn't get copied. If you'd rather not pay to bring checklist templates across, you can export them yourself and rebuild them in the destination account at no charge.

4. Have Both Master Admins Authorize It in Writing

We won't start on a phone call or a forwarded note. Because a transfer touches two live accounts and can't be undone, we need it from both sides in writing — the master admin whose account is losing the Location, the master admin whose account is gaining it, and whoever is authorizing the charge. Each one has to come from that person's own master-admin address.

Alongside the authorizations we'll send a short form to gather the details: which Location, which two accounts, what's riding along. Fill it in as early as you like — we won't act on it until all the authorizations land, so submitting it first just shortens the wait.

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.

See Location Transfer FAQ

> Both accounts have to be active paid accounts for the move to run. If the destination is a brand-new account, get it onto a plan before the transfer weekend rather than after.

5. Download a Backup Before the Weekend It Runs

Transfers are careful and data loss is very rare — active data sits on multiple servers, and we do the move by hand precisely so nothing gets guessed at. But it is still a one-way move of years of records between two accounts, and the cheapest insurance in this whole process is the copy you already have a right to.

Pull the most recent monthly backup before the scheduled weekend, and open it to make sure it isn't empty. If your office hasn't been downloading them, this is a good moment to start.

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

6. Pick Up on the Other Side

We run the move on a weekend, during off-peak hours, and it's usually done within a couple of hours of starting —

though the exact finish depends on how much data is in flight, so we won't promise you a clock time. Plan for people to stay out of the source account that weekend.

On Monday, the Location and its transactions are in the destination account, and the agents sign in with the same email address and password they had before. Nothing about their credentials changes. Each transaction keeps the status it left with, so an office mid-season lands mid-season.

What's left is housekeeping in the account that gave the Location up. It's now empty, so you can close it or switch it off.

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