Open a New Office — New Location or New Account?

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Two offices, one bill or two? Because Pipeline prices on transaction volume rather than headcount, the answer is usually simpler than it looks.

Introduction

You're opening a second office. Maybe you've bought a book of business, maybe a team has grown into its own branch, maybe you've moved your licence to a new company and want to keep working the way you always have.

It feels like a question about Locations. It isn't — it's a question about your bill. Your Transaction Plan is priced on how many transactions you create each month, not on how many people you have, so adding the new office's agents costs nothing on its own. That reframes the whole decision: *one Location or a separate account?* is really *one plan or two?*

Your history isn't on the table either way. Bringing a new office in as a Location leaves every transaction you've already closed searchable and reportable right where it is.

When to Use This

- You're opening a second office or branch and don't know whether it needs its own account.
- You've changed brokerages or merged, and want the new company's transactions kept apart from the old ones.
- A team inside your brokerage has grown big enough to want its own reporting.
- A franchise is leaving to run independently and needs to take its files.

1. Start With the Bill, Not the Org Chart

Everything below follows from one fact: plans are billed on the transactions you create in a month, and users are free. Adding a hundred and sixty agents to your account doesn't change your bill by itself, and we'll bulk-load a roster of that size at no charge.

So the real question is how many plans you want to pay for. One account means one plan covering both offices' combined volume. Two accounts mean two plans, each priced on its own office's volume, and each billed separately.

Once you see it that way, the rest is about how the two offices relate.

2. Choose One Account When the Offices Share a Business

If the offices are two parts of one company — shared ownership, shared oversight, a broker who wants the whole picture — add the new office as a Location.

A Location gives you real separation inside one account. Each office's transactions, users, and permissions are its own, so you can track, search, and report on each one independently while every historical file stays reachable in the same place. Company-wide and per-office reports aren't an either/or; you can run both. And it's one plan, one bill, one login for anyone who works across both.

If the company name is changing but you don't need the transactions kept apart, you may not need a new Location at all — renaming your existing one and updating its contact details is enough.

3. Choose Two Accounts When the Offices Run Independently

Separate accounts are for separate businesses: a franchise going its own way, a partner buying out, two brokerages that just happen to share an owner.

Understand what independence costs you. The accounts can't see each other. There's no cross-account reporting, no shared history, and no shared logins — Pipeline identifies a person by email address within an account, so anyone working in both offices needs a second profile under a different address. Each account carries its own plan and its own bill.

If that's genuinely what you want, start a free trial for the new company and we'll take it from there.

> Working across two accounts yourself once they're split? See Manage Your Pipeline Login Across Brokerages.

4. Add the Location to Your Existing Account

If you've landed on one account, create the Location under the new office's name and the separation you just chose starts applying to everything filed under it.

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

See Adding a Location

5. Scope Each Office's Admin to Their Own Location

This is what makes one account feel like two to the people inside it. Permissions are granted per Location, so the new office's manager can be given admin rights in their Location alone — they'll run their own agents, transactions, and reports without seeing yours, and the same works in reverse.

The exception is master admins, who reach every Location by definition. Keep that role with whoever genuinely oversees the whole company.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

6. Ask Us to Move Anything Already in the Wrong Place

Adding or renaming a Location never reassigns transactions that are already filed elsewhere, and there's no self-serve way to move a batch of users between Locations. Both are things we do for you.

Moving a whole Location — its users and its transactions — into a different account is a paid Data Transfer. Both accounts have to be active and paid, master admins on both sides have to authorize it in writing, and we quote the cost once we've reviewed both accounts. Moving users between Locations inside one account is handled by our team for a fee.

Tell us what you're trying to end up with at help@paperlesspipeline.com and we'll tell you what it takes. If a transfer is already in motion, add that Location's new transactions straight to the destination account so they don't need moving twice.