Rebrand Your Company Across Pipeline

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Your brand lives in a handful of places in Pipeline — your company settings, your locations, and your team's email signatures. Here's each one, in the order to update it.

Introduction

Brokerages change names. You picked up a new DBA, another company acquired you, you dropped a franchise or joined one. Pipeline doesn't need to know why. It just needs the new name in the few places it still carries the old one.

Those places aren't all in one screen, which is the only thing that makes this tricky. Your company name, license number, and logo are account-wide settings. Your location names sit with each location. And your team's email signatures belong to each person individually, so those are the one part you can't do for them. Everything at the account level is a master admin's to change.

Nothing you've already filed is at risk here, and you don't need a new account. Renaming your company or your locations leaves every past transaction exactly where it is and still viewable. Your history comes with you under the new name.

When to Use This

- Your brokerage changed its name or started doing business under a new DBA.
- Another company acquired your brokerage and you're keeping the same Pipeline account.
- You left a franchise, or joined one, and the old brand is still showing.
- Ownership changed hands and the new owner wants their name on everything.

> Running two brands at once? A Pipeline account holds one company name, one brokerage license number, and one logo, and they apply everywhere in the account — locations can't carry their own branding. If the old brand needs to stay live alongside the new one, that's a second account. See Get Help and we'll talk it through.

1. Decide Whether to Separate Your Old Transactions

Start here, because it changes what you do to your locations later.

Most offices just rename everything and carry on — old and new transactions stay together under the new name, and the whole account reads as one company. That's the simpler path, and it's what most rebrands want.

Choose to separate instead if you need the old company's work kept apart from the new company's — for reporting, for a clean handover date, or because the two really are different books of business. In that case you'll add locations under the new name and retire the old ones, rather than renaming them.

Either way your old transactions stay intact and searchable. This is about how they're grouped, not whether you keep them.

2. Update Your Company Name and License Number

This is the change that matters most — the company name is what prints on new coversheets and, if you generate them, on your commission documents.

Set the company name and brokerage license number that identify your account throughout Pipeline.

See Company Name & License

3. Replace Your Company Logo

Your logo is the other half of the account-wide brand. Swap the file and the new one shows up on your team's Home page and on new coversheets.

Add your brokerage's logo so your Home page, coversheets, and commission documents all carry your brand.

See Company Logo

4. Update Your Location Names

Your locations carry the old office names, and they show up wherever your team picks or filters by office. What you do here depends on the call you made at the start.

Keeping everything together? Rename each location in place.

Every Location has a name that identifies it across Pipeline — and you can update that name anytime.

See Location Info

Separating old from new? Add a location under the new company name for work going forward, then deactivate the old one. Its transactions stay reportable, but nothing new lands in it.

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

See Adding a Location

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 added a location, your people can't reach it yet. Permissions in Pipeline are granted per location, so a user with full access to your old office starts with none in the new one — grant each person their permissions in the new location before they need it. See User Permissions

Each location's contact information and its Commission & CDA settings sit on this same page. If your rebrand moved your offices, changed your phone numbers, or changed the signature on your CDAs, update those while you're here.

5. Update Your Admin & Support Contact

Your admin and support contact is the name, email, and phone your team sees on their Home page when they need help — and the address Pipeline's automated emails come from. If the rebrand changed who that is or gave them a new email address, this is worth a minute.

Point your team to the right person for help — the contact shown on every Home page and used on system emails.

See Admin & Support Contact

6. Ask Your Team to Update Their Email Signatures

This is the one you can't do for them, and it's the one that outs an old brand longest. Anyone who set a custom email signature is still signing off as the old company on every message they send from Pipeline.

Each person updates their own from their profile, under *My Info*. A short note to your team is usually all it takes.