Location Deactivation

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Deactivate a Location you no longer use to keep your Locations list focused on the offices and teams you're actively running.

Introduction

Closing an office doesn't mean losing what happened there. Deactivating a Location retires it from the lists your team picks from, and the deals that closed under it stay in your account, still searchable and still reportable.

Locations aren't deleted in Pipeline, and that's deliberate. A Location holds users, transactions, and years of financial history, and there's no version of deleting it that doesn't put some of that at risk. Deactivating is the route instead. A deactivated Location drops out of the places you'd go to start something new, like picking a Location for a transaction or adding a user, while staying available where you'd go to look something up.

So the question worth answering first isn't whether you're going to lose the history. It's whether anyone still needs to file new work there. Leave the Location active until the last deal in it is genuinely done. And if you need its name for the office replacing it, rename the old one before you retire it, since two Locations can't carry the same name.

How It Works

Retiring a Location is a deliberate, confirmed step you take from the Manage Locations page.

Deactivate, Not Delete

Pipeline retires a Location by deactivating it rather than deleting it, so removing a Location from your active list is a reversible-feeling, low-risk action.

Where to Deactivate

You deactivate a Location from the Manage Locations page, using the gear menu next to the Location you want to retire.

Confirming the Change

Deactivating asks you to confirm before it takes effect, so you don't retire a Location by accident.

Deactivate a Location

Retire a Location from the Manage Locations page using its gear menu.

Who Can Do This: Master Admin and admins with the "Create users and locations" permission.

To deactivate a Location:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. From the left menu, click [Manage Locations].
3. To the right of the Location, click the gear and select [Deactivate Location].
4. Click [Deactivate] to confirm.

The Location is deactivated and no longer appears among your active Locations.

Empty It Before You Retire It

A Location has to be clear before it can be closed — no users, no transactions, no unassigned docs left in it. Moving a handful of transactions yourself is quick enough; a few hundred isn't, and there's no bulk way to do it from inside Pipeline.

Frequently Asked Questions

Can I delete a Location instead of deactivating it?

Deactivating is how you retire a Location. Rather than deleting it outright, Pipeline deactivates the Location so it drops off your active list while staying on record.

Who can deactivate a Location?

A Master Admin, or an admin with the "Create users and locations" permission. The same admins who can add and rename Locations can retire them.

Where do I deactivate a Location?

On the Manage Locations page. Click the gear to the right of the Location, choose [Deactivate Location], then click [Deactivate] to confirm.

We're dissolving a team — how do I move everyone out before deactivating its Location?

Change each agent's Primary Location first, then deactivate the Location. On the Manage Users page, open each agent, set a new Primary Location from the dropdown, and click [Update User] before you retire the old Location.