Retire a Location Without Losing Its History

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An office closes and its deals still matter — for audits, for reporting, for the year you'll be asked about later. Deactivating the Location keeps every one of them and stops anything new from landing there.

Introduction

A branch closes. Two offices become one. The brokerage changes its name and you'd rather not have the old company's deals mixed into the new company's numbers. In each case you want the Location out of the way without any of its records going with it.

Deleting isn't the tool for that, and Pipeline mostly won't let you do it anyway: a Location can't be deleted while it still holds users, transactions, or unassigned docs. Which is to say, while it still holds anything worth keeping. Emptying it out to make deletion possible is exactly the outcome you're trying to avoid.

Deactivation is what the situation actually calls for. The Location stops appearing where new work gets created, and every transaction inside it stays where it is: open it, search it, report on it, hand it to an auditor. Nothing moves.

When to Use This

- You closed a branch office and want it off your working Locations list.
- You tried to delete a Location and Pipeline wouldn't let you.
- Two of your offices merged and one name should stop being an option.
- The company was renamed or sold and you want the old deals kept separate from the new ones.
- An agent left and you want their old Location closed without touching their closed files.

Why This Beats Deleting It

The instinct is that a closed office should disappear, and a Location you can't delete feels like a limitation. It's closer to a guardrail. Real estate records outlive the office that produced them — the state audit, the commission dispute, the file somebody asks about four years on. A deleted Location takes the thread back to those deals with it.

Deactivation splits the difference exactly where you want it split. What you're actually asking for is*stop showing me this office*, not *forget this office existed*. Deactivation does the first and refuses the second, and that refusal is the part you'll be glad of later.

1. Move Its People to a Live Location

Start with the users, because a deactivated Location shouldn't be anyone's home. On the Manage Users page, open each person still assigned there and set their Primary Location to whichever office they're working out of now.

Then grant their permissions in the new Location. Permissions don't travel with a Primary Location change — they're held Location by Location, so a person moved without a permission pass can end up unable to see the office they now sit in.

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

See User Permissions

> Anyone who's left the company entirely gets deactivated rather than moved. Their transactions stay in the old Location either way, which is the point.

2. Deactivate the Location

With people pointed elsewhere, retire the Location itself.

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

From that moment it stops being an option when anyone adds a transaction or a user, and it drops off the working list. Its existing transactions carry on exactly as before — open, searchable, reportable, downloadable — and the Location still appears in the dropdowns you filter searches and reports by. That asymmetry is the whole feature: invisible where new work starts, present everywhere you look backward.

> Only closing it in name? If the office isn't going anywhere and you just want it labeled, rename it instead — some accounts run *Main Street — Closed* for a season rather than deactivating, so the Location keeps taking work while everyone reads the sign.

3. Fence Off a Rebrand or a Merger the Same Way

The same two moves handle a change of company. You don't need a new Pipeline account for a new name — most offices carry straight on in the one they have.

Add a Location under the new company name, point everyone's permissions and Primary Location at it, and deactivate the old one. New deals land under the new name; every deal you've ever closed stays under the old one, intact and searchable. If you'd rather the two sets stay together, skip the new Location and rename the existing one — that keeps all the transactions grouped as they are.

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

See Adding a Location

> Running the Commission Module? Commission and CDA settings live per Location and don't come along with a new one. Configure them on the new Location before anyone enters commissions there.

4. Filter Your Reports by Location

Here's the part worth saying plainly, because it surprises people who thought deactivation would settle it: **company-wide reports still include the deactivated Location.** Deactivating stops new work; it doesn't remove the old work from your totals, and it shouldn't — that history is still your brokerage's production.

When you want the new company's numbers on their own, filter by Location. When you want everything the account has ever done, run it company-wide. Both readings are available; you just have to choose which one you're asking for.

> This matters most in the first year after a rebrand, when a company-wide number quietly containing the old company's deals is easy to mistake for the new company's performance. If you report to anyone on those figures, set the Location filter first.