Consolidate a Person’s Duplicate Profiles

Last Modified on 09/04/2026 11:10 am EDT

Two profiles, one person — usually because they were added twice, once under a work address and once under a personal one. There's no merge button, but there is a clean way to end up with a single login and none of the history lost.

Introduction

An agent has two logins and can only see half their deals from either one. A profile was created for someone who already had one under a different email. A person changed their address and now Pipeline says it's already registered, because the old profile is still sitting there holding it.

Pipeline won't merge two profiles into one. It's a firm no rather than a missing feature: merging would have to fuse two separate activity histories, and the result would be a record that says a person did things they didn't do under a profile that didn't exist at the time.

What you do instead is choose a survivor and move the work to it. The transactions get reassigned one at a time, the duplicate gets deactivated, and the agent ends up with one login that reaches everything. The history stays honest because each profile keeps its own. The deactivated one just stops being somewhere new work can land.

When to Use This

- An agent has two Pipeline logins and can only see some of their transactions from each.
- You added someone who already had a profile and now there are two.
- Updating a user's email fails because the address is already registered inside your own account.
- Commissions are landing on the wrong one of a person's two profiles.
- An old profile keeps appearing in the agent-assignment dropdown and shouldn't.

Why This Isn't a Merge

Everyone arrives wanting the merge, so it's worth being clear about the trade rather than just refusing. A merge would have to pick one profile's activity history and staple the other's onto it, and every entry that moved would then be attributed to a profile that wasn't the one that did the work. In an industry where the record of who reviewed a document is the thing you produce at audit, that's a bad bargain for a bit of convenience.

Reassigning transactions gets you the outcome you actually wanted — one login, all the files — without rewriting anything. The cost is that it's per transaction. If the person has three, it's a five-minute job. If they have fifty, it's an afternoon, and worth asking us about before you start.

1. Check Whether the Duplicate Is Deliberate

Before you consolidate, make sure the second profile isn't doing a job. A broker who also carries their own listings sometimes runs two on purpose — a broker profile and an agent profile — and that separation is exactly what keeps broker earnings and agent earnings apart on your reports. Merge those and the split you were relying on disappears.

You run the office and you also carry your own listings. One profile almost always covers both — and there's exactly one reason to reach for a second.

See One Person, Two Roles (Broker Who Is Also an Agent)

If the second profile is just an accident of onboarding, carry on.

2. Pick the Profile That Survives

Choose the one the person will keep logging into. In practice that's usually whichever holds the most transactions — fewer files to move — and whichever carries the email address they actually read.

A user's profile holds who they are and where they work — their name, role, primary location, and license number.

See User Profile

> If the duplicate is inactive and the active one is the newer, emptier profile, it's often less work to flip the choice: reactivate the older profile, make that the survivor, and move the newer profile's handful of files onto it.

3. Find the Other Profile's Transactions

Search on the profile you're retiring. Global Search takes an agent term, so you can pull every transaction attached to that profile by name or email address — and it works whether the profile is active or already deactivated, so there's no need to switch anyone back on to see the list.

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Global Search

4. Reassign Each Transaction

Work down that list. On each transaction, open **Edit Transaction**, go to the agent assignment, uncheck the duplicate profile, check the surviving one, and save. The file, its documents, and its history stay exactly where they are — you're changing which profile it's credited to, nothing else.

Put the right agents on each side of a transaction so Pipeline credits the deal correctly and everyone can open the file and work it.

See Assign Agents

> Running the Commission Module? Reassigning the agent doesn't move the money. Re-enter the commissions on each transaction you've changed so the CDA regenerates crediting the right profile — otherwise the deal shows under the new profile while its disbursement still names the old one.

Long list? Write to help@paperlesspipeline.com before you start clicking. Tell us both profiles and roughly how many transactions are involved, and we'll tell you whether there's a faster route for your account or whether it's genuinely a manual job.

5. Deactivate the Duplicate

With nothing left assigned to it, turn the extra profile off. It disappears from the agent-assignment dropdowns, stops appearing on your active roster, and can't be logged into — while everything it ever did stays recorded.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

If the point of the exercise was to free up an email address, deactivating the duplicate is what releases it inside your account — you can then put that address on the surviving profile. An address held by a profile in a *different* Pipeline account is a separate situation with its own answer.

An agent you're onboarding already has a Pipeline profile somewhere else, and their address can only hold one. Getting them onto your roster comes down to a single question — and it's the agent who answers it.

See Add an Agent Whose Email Is Already in Use Elsewhere