Offboard a Departing Agent Without Losing Their Files

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An agent leaves and their work stays exactly where it is. Deactivation ends their access without touching a single transaction, document, or commission tied to their name.

Introduction

Someone resigns, gets terminated, retires, or moves to the brokerage across town. By tomorrow morning you need their login switched off, and you need every deal they ever closed still sitting in your account, because those files are the brokerage's record, not the agent's.

Both of those are true at once, and that's the whole point of deactivating a user rather than removing one. Turning off a profile ends the person's access and nothing else. Their transactions, documents, activity history, commission information, CDAs, and financial reports all stay put, exactly as they were, for history, auditing, and reporting.

What makes an offboarding go wrong is almost never the deactivation itself — it's the order. A few things only work while the profile is still active, and once it's off, undoing that costs you a round trip. The sequence below is arranged so nothing has to be redone.

When to Use This

- An agent is leaving your brokerage and you need their access turned off without losing their closed deals.
- You terminated someone and want them out of Pipeline today.
- You want to fully remove a user so they can no longer log in, and you're hunting for the delete button.
- An agent passed away and their transactions need to stay exactly where they are for reporting.
- A departing agent's new brokerage can't add them, because their email address is still in use at your office.

Why This Beats Deleting the Profile

The instinct is to delete the person — scrub them out, tidy the list, done. There's no delete, and that's deliberate. Every transaction they touched, every commission you paid them, and every document they uploaded is linked to that profile. Deleting it would take your own records with it, which is precisely what a brokerage can't afford when a state audit or a commission dispute arrives two years later.

So deactivation does the part you actually wanted: the login stops working, the person comes off your active user list, and they're hidden from the **Assign Agents** field so nobody accidentally puts them on new work. They remain visible to admins as *[Name] (inactive)* for searching and reporting. You lose the access. You keep the history.

1. Let the Agent Take Their Copies First

Deactivation is the deadline. The moment the profile is off, the agent can't open a transaction or email themselves a document — so if they're going to want copies of their own deals, it has to happen while they can still log in.

This costs you nothing. The transactions stay in your account exactly as they are; the agent leaves with copies. Sorting it out before their last day is what keeps the conversation from turning into a favor you have to do for them a month later.

There's no one-click export of an agent's deals. There is a dependable way to get every one of them, and it starts before their last day.

See [Get an Agent's Files Offline Before They Leave]

2. Close Out Commissions While the Profile Is Still Active

Commissions can only be entered for active agents. If a deal of theirs still needs its commissions entered or its CDA generated, do it now, before you turn anything off.

Missing this doesn't lose you anything — it just costs a round trip. You'd reactivate the profile, enter the commissions, generate the CDA, and deactivate again. The transaction's financial information stays intact throughout.

> If the **Manage Commissions** option has already vanished from a transaction, this is exactly why: the only agent assigned to it is inactive. Reactivate them, enter the commissions, then deactivate them again.

3. Hand Off the Deals That Are Still Live

Closed deals need nothing from you. They stay attached to the departing agent's name, which is what your records require. It's the in-flight ones that need a decision: who owns this transaction now?

Reassign those before you deactivate. Once the profile is inactive, that person is hidden from the **Assign Agents** field on Add and Edit Transaction pages, so putting the new owner on is simplest while everyone is still selectable. On each live transaction, remove the departing agent under Assigned Agents and add the person taking over. Commissions on those transactions may need reassigning too.

Your own access never depends on any of this. A master admin can see and manage every transaction in the account regardless of whose name is on it, and regardless of whether that person is still active — so a deal you miss today is still fully reachable tomorrow.

> Facing a long list? We can bulk-add an agent or assistant across another agent's transactions for a fee — email us and we'll scope it. We can't bulk *remove* agents, though, so removals stay a per-transaction job.

4. Deactivate the Profile

Now switch the access off. Their login stops immediately and they drop off your active user list, while everything tied to their name stays in the account.

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

See User Deactivation

> If the person leaving is a master admin, remove that role first, then deactivate — a departing admin should never be the last one holding the top of your account. Work out who's taking it over before they walk out the door.

Agents come back, and when this one does, reactivate the profile you just turned off rather than adding them as a new user. Their history is attached to the original; a second profile for the same person starts empty.

Bring a former user back into Pipeline with their history intact.

See User Reactivation

5. Clear the Tasks the Profile Leaves Behind

Deactivating a person doesn't quiet their tasks. Tasks belong to transactions, not to users — deliberately, so that a departure never erases a compliance record — which means their incomplete tasks keep their due dates, keep appearing on the Tasks page, and keep sending reminders.

Go through what's left on their deals and settle each one honestly: mark the finished ones complete, remove the due date from anything nobody is chasing, or delete a task or an entire checklist that no longer applies. A master admin sees every incomplete task that has a due date, so whatever you skip here is what you'll keep seeing.

> Message templates the agent built stay attached to their profile, so they'll still be there if it's ever reactivated. If someone else needs to own them now, email us and we can move templates from one profile to another.

6. Free Their Email Address for Their Next Brokerage

A week later you may hear from the agent, or from their new office: the new brokerage can't add them because the email address is already in use. One address can belong to only one active profile at a time, and deactivating their profile at your office is what releases it.

So if you've worked through the steps above, this is already done — there's nothing left to release. If you haven't, and the agent is asking, deactivation answers both questions at once.

If Pipeline says the email address already exists, that address is already attached to a Pipeline account — here's how to free it up or work around it.

See Can't Add a User? Email Already Exists