Location

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Every transaction sits in one of your offices, and its Location is the field that says which. A master admin can change it at any point in the deal.

Introduction

A deal went in under the wrong office, or the agent who ran it has since moved to another branch, and now it's showing up in the wrong reports.

Location is the field that decides that. Every transaction carries one, picked when the transaction is created, and it belongs to the deal rather than to the people on it. That's deliberate: an agent moving to your Westside office doesn't mean last year's closings happened there.

So a deal filed under the wrong office is a field to change, not a file to rebuild. One save puts it right for everybody.

How It Works

One field on the deal, and it decides which office the deal counts under.

One Office Per Deal

A transaction carries a single Location, chosen when it's created. It's the office the deal belongs to, and it stays with the deal while the people working it come and go.

What the Location Decides

An office's lists and reports count a deal by its Location, so it's what makes the numbers for a branch add up. Access reads it too: permissions are granted office by office, so where a transaction sits is part of who can open it.

Where It Changes

The Location dropdown sits near the top of [Edit Transaction], on the transaction itself. One save files the deal under its new office account-wide, for everyone who works with it.

Move a Transaction to a Different Office

> File a deal under the office it belongs to, so it lands in the right lists and the right reports.

> **Who Can Do This**: Master admins. Anyone else won't see the Location dropdown, and the Admin & Support contact shown on your Home page is the person to ask.

To move a transaction to a different office:

1. Open the transaction you need to move.
2. Click [Edit Transaction] from the left menu.
3. Change the **Location** near the top of the page to the office the deal belongs to.
4. Save your changes.

The transaction is filed under its new office account-wide, for everyone who works with it.

Check Who Can Open It in Its New Office

Permissions are granted office by office, so a deal that moves lands under a different set of them.

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See Transaction Access

Move Two Offices' Deals Together

When it's an office rather than a deal, it isn't a transaction-by-transaction edit.

Two of your offices are becoming one. Our Tech Team can move a Location's transactions into another one in bulk, so nobody re-files them a hundred at a time.

See Location Merge

Move an Office to a Different Pipeline Account

That's a different move from the one on this page: a whole office changing accounts, rather than a deal changing offices inside one.

An office is moving to a different Pipeline account. A Location Transfer brings the whole thing across: every transaction, every user, logins and all, so nobody rebuilds a thing.

See Location Transfer

Ways to Use Location

See Location at work inside a bigger job:

- Move an Agent's Transactions to a Different Office