Move an Agent's Transactions to a Different Office

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An agent moved to your other office and their deals stayed behind. Here's why that happens, and the reliable way to bring the files across.

Introduction

Two different fields are involved and they don't talk to each other. A user has a primary Location, where that person works. A transaction has its own Location, where that deal lives. Changing the first does nothing to the second, on purpose: your agent moving to the Westside office doesn't mean last year's closings happened there.

So the transactions have to be moved deliberately. It's a master-admin job, done one transaction at a time, and the only real question is whether the count is small enough to do yourself.

When to Use This

- An agent transferred to another office and their transactions are still showing under the old one.
- You updated the agent's profile location and nothing moved.
- Your reports for the new office are missing the deals that should be in them.
- A transaction was entered under the wrong Location and you need it filed correctly.
- A whole office is being reorganized and hundreds of transactions need to land somewhere else.

1. Update the Agent's Profile First

Start with the person, so everything they do from today forward lands in the right place. Their primary Location, and their permissions in the new office, both live on their profile.

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

See User Profile

> If they'll keep working files in both offices for a while, they can hold permissions in more than one Location at a time — you don't have to cut the old one off the same day.

2. List the Transactions That Need to Move

Global Search scoped to the agent gives you the full set in one place, closed deals included, which is the list you'll work from. Leave it open.

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

3. Change Each Transaction's Location

Open a transaction, change its Location, save. Only a master admin can do it — location admins can't, and agents certainly can't — so if you're not one, this is a request to send rather than a task to do.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

> The fastest way to work a stack: from your search results, right-click each transaction name and open it in a new browser tab. Ten tabs, ten edits, one pass — much quicker than opening and backing out of each one in turn.

4. Ask for a Bulk Move When the Count Is Large

There is no self-service bulk move, and at a few hundred transactions the tab trick stops being funny. Our Tech Team will move a Location's transactions in bulk as a paid manual service — send support the rule you want applied and they'll confirm scope and cost before anything happens.

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

5. Re-Check Access in the New Office

This is the step that catches people. Access follows the transaction's Location, so a transaction that moves lands under a different set of permissions — and an agent who could open it yesterday may not be able to today, if they don't hold the right permissions in the destination.

Walk one moved transaction as the agent would see it before you move the other two hundred.

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

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

See User Permissions