Reassign a Departed Agent's Transactions to Someone Else

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An agent has gone and their name is still on forty deals. Sometimes that's exactly right and you should leave it — and sometimes the file genuinely needs a new agent of record.

Introduction

Start with the question most offices skip: does the agent of record actually need to change? Deactivating a user ends their access and leaves everything else alone: their transactions, their documents, their commission history, their name on last year's production reports. Nothing is lost, and a master admin can still open every one of those files.

So reassignment isn't a housekeeping step after someone leaves. It's a deliberate change you make when somebody else has to work a live deal, and it's worth doing only to the transactions that need it.

When to Use This

- An agent left mid-deal and someone else is taking their pending transactions to closing.
- An agent has passed away and someone has to pick up their active files.
- You need to credit historical transactions to an agent who was never a Pipeline user.
- You're worried that deactivating someone will take their transactions with them.
- A whole book of business is moving from one agent to another.

Why This Beats Reassigning Everything

The instinct on an agent's last day is to sweep every transaction they ever touched onto someone else, so nothing still carries a departed person's name. It's a lot of work and it makes your history less accurate: the deals they closed were theirs, and the production reports for those years should keep saying so.

Deactivation already gives you the two things you actually wanted — their access is gone, and every file is still there and still reachable. Reassign the handful of live deals someone has to work, and leave the record alone.

1. Deactivate the User First

This is the safe, reversible step and it does most of the job. Access ends immediately, the work stays where it is, and you can reactivate the person with their history intact if they come back.

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

See User Deactivation

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.

See Offboard a Departing Agent Without Losing Their Files

2. List What They're On

Search by agent to see everything with their name on it, closed deals included. Then sort the list into two piles: the live deals somebody has to finish, and the history that should stay as it is.

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. Reassign the Live Deals

For each transaction that needs a new agent of record, unassign the departing agent and assign the incoming one on the same side. There's no bulk control for this in the app, so it's one transaction at a time — the browser-tab approach makes short work of a dozen.

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

> Transactions can't be merged, so resist the temptation to consolidate two agents' overlapping files into one. If documents need to move, reassign them to the transaction you're keeping before you retire the other.

4. Credit an Agent Who Was Never a User

Occasionally a historical deal belongs to someone who never had a Pipeline account — an agent who left before you moved onto Pipeline, or one who never logged in. You can still put their name on the file: create the user under their real email address, don't send the welcome email, and deactivate them straight away. The account exists purely so you can assign the transaction to them, and it grants nobody anything.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

Send new users their login details the moment you're ready — and not a second before.

See Welcome Emails

5. Ask Us When the Count or the Circumstances Warrant It

A whole book of business moving between agents is a bulk job our Tech Team does for a fee — send the rule and an admin's authorization and they'll confirm scope first.

The other case worth naming: when an agent has died, you don't have to work through their active transactions yourself. Contact support with their name and what you need, and we'll reassign the active files for you.

Need a hand? The quickest way to reach us is right inside Pipeline — and a real person on our team reads every message.

See Get Help

> If what you actually need is a copy of their deals outside Pipeline before the account changes hands, that's a different job. See Get an Agent's Files Offline Before They Leave.