Get an Agent Their Own Contact List

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An agent can't download the office contact list, and that's deliberate. Here's what an admin can hand them, and what they can pull for themselves without asking.

Introduction

An agent goes looking for a download button on their contacts and doesn't find one. Nothing is broken and nothing is missing from their permissions. Bulk contact and transaction downloads sit at the admin level on purpose, because both of them reach across every transaction in the account rather than stopping at the ones a person is on.

So the request routes through an admin, and the admin's job is to scope it: give this agent their own clients, not the office's. There are two ways to do that. And separately, there are three things the agent can do for themselves the moment they need contacts off a deal, none of which need anyone's help.

When to Use This

- One of your agents asked for their client list and couldn't find any way to download it.
- You want to give an agent their own buyers and sellers without handing over the whole office's.
- An agent is leaving and wants a copy of the contacts they brought and built.
- An agent needs the contacts off one transaction right now and doesn't want to wait on an admin.
- You're about to send a spreadsheet to an agent and want to know what to strip out first.

Why This Is Held at the Admin Level

It reads like an oversight, especially to an agent who is only asking for their own clients. It isn't. The *All Contacts* export doesn't have a scoped version — it's the whole account or nothing, every contact on every transaction the brokerage has ever run, including the ones belonging to agents who have nothing to do with the person asking. There's no per-agent variant of that button to hand out, so the button stays with the people responsible for the account.

Which means the scoping is a thing an admin does, not a permission that gets granted. Filter the export down, or search the agent's transactions and export those, and the agent gets exactly their own list with none of the rest of the office attached to it.

1. Filter the Export Down to That Agent

The *All Contacts* spreadsheet carries an **Added By** column, and that column is what makes this a one-minute job. Download the export, filter **Added By** to the agent's name, and what remains is the contacts that agent personally put into Pipeline.

Every contact your office has ever added to a transaction, in one spreadsheet you can sort, share, or load into another tool.

See Contact Export

> This route follows who *entered* the contact, not whose deal it was. If your office has an admin or a coordinator adding contacts on behalf of agents, everything they typed lands under their name, and the second route is the one that matches what the agent actually means.

2. Or Search Their Transactions and Export Those

The other route starts from the deals rather than the contacts. Global Search on **agent:** with the agent's name or email address returns every transaction they're on, in any status, going back as far as your account does. Download that list with all transaction columns and the buyer and seller details come with it, around columns AJ to AQ.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

> This is the better route when the agent means *my clients* rather than *the contacts I typed*, and it's the one to use when someone is leaving. Add a close-date range in *More Search Options* if they only want a particular period.

3. Trim It Before You Send It

A transaction spreadsheet with all columns carries a great deal more than contact details. Commission figures, admin notes, and every internal field your office fills in are all in there, and none of it belongs in a file you're handing to one agent about their own deals.

Open it, delete the columns that aren't names and contact details, save it, then send it. It takes a minute and it's the difference between answering the request and handing over the account.

4. Show Them What They Can Do Themselves

Most of the time the agent doesn't want a database. They want the escrow officer's phone number off a deal they're working, and they want it now. Three routes get them there without an admin, all from inside the transaction they're already looking at.

- **The coversheet** — download the transaction's coversheet as a PDF and every contact on the deal is listed on its last page. It's the fastest single answer for one transaction.
- **The coversheet, emailed** — send that same coversheet to their own address from the transaction, which gets it onto their phone without a download.
- **The contacts, in a message** — drag the contacts into a message from the transaction and send it to themselves. What arrives is the contact details as text, ready to copy wherever they need them.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

> One transaction at a time is the trade-off. These are quick for a deal or two and slow for a hundred, which is exactly the point at which the request comes back to an admin and the first two steps are the answer.