Tell Which Coordinator Owns Which File

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Pipeline has no coordinator field. It has four ways to make one, and which fits depends on how your office is built.

Introduction

Two or three coordinators share an account, everyone's files sit in the same list, and there's no column that says whose is whose. There's no **Transaction Coordinator** field to fill in and no filter that groups the list by coordinator, so the obvious move isn't available.

The @mention on a task looks like it should solve it, and it doesn't. You can mention a coordinator on every task you want them to own, but transactions can't be searched by who was mentioned, so the mention organizes the work without ever organizing the list.

What does work is marking the transaction itself with something Pipeline can search. Four things can play that role, they can be combined, and the right one depends less on preference than on how your coordinators are actually deployed.

When to Use This

- Two or three coordinators share one account and you can't tell whose file is whose.
- You're balancing workload and need a count per coordinator, not a guess.
- You @mention your coordinators on tasks and can't search the transactions list by it.
- Each coordinator wants a Home page view of only their own files.
- You went looking for a Transaction Coordinator field on the transaction and there isn't one.

Why This Marks the File Instead of Filtering the List

Almost everyone arrives at this looking for a filter. Show me one coordinator's transactions, the way you'd show one agent's or one office's. And the reason there isn't one is upstream of the search: Pipeline can only filter on what's recorded on a transaction, and right now nothing on the transaction records who is coordinating it.

So the work moves one step earlier. Put the coordinator onto the file in a way the search can already reach, and the filter you wanted appears as a side effect. Every option below is a different answer to *where do we put that mark*, and each has consequences beyond search, which is why the choice is worth making deliberately rather than trying whichever is quickest.

1. Decide What Will Mark the File

Read these as four shapes of office rather than four features, and pick the one that describes yours.

- **Coordinators work alongside the agents**— tag them as assistants. It records who's on the file without touching production credit.
- **Coordinators are outside your user list, or work for an outside firm**— add them as contacts. It's the only

route that reaches someone who isn't a user in your account.

- **Coordinators change file to file, and you want it visible at a glance**— put a symbol in the transaction name. It's the lightest to adopt and the only one you can see without searching.
- **Coordinators own whole books of business** — give each one a Location. It scopes the entire account for them rather than filtering it.

They combine. An office that tags assistants for the search and uses a symbol for the glance is running two of these and neither undoes the other.

2. Tag the Coordinator as an Assistant

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants

> Once they're tagged, Global Search on **agent:** with the coordinator's name or email address returns every transaction they're attached to, with the count at the top. That count is the workload number, and it's live rather than a report somebody maintains.

3. Or Add the Coordinator as a Contact

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

> Search **contact:** for the individual coordinator or **contact-company:** for the firm they work for. The company search is what makes this the right route for an outsourced coordination service, since one search covers everyone they send you.

4. Or Put a Symbol at the Front of the Name

The lightest option, and the only one that works without a search: agree on a symbol per coordinator and put it at the start of the transaction name. Now the list itself tells you whose file each one is, and each coordinator can search their own symbol to pull their set.

A transaction's name is how you'll recognize it at a glance — set it to match your office's convention.

See Transaction Names

> Names are also how everyone finds a deal, so pick symbols nobody would type by accident and put them in the same position every time. Renaming is an admin job by default, which keeps the convention from

drifting but also means the mark moves when a coordinator does.

5. Or Give Each Coordinator Their Own Location

The heaviest option, and the only one that changes what a coordinator sees rather than what they can find. A Location per coordinator, with admin rights in that Location only, means each one opens Pipeline to their own book and nothing else.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location

> This one reaches into access rather than just search, and access has its own decisions attached. A TC touches every file in your office but shouldn't own any of them. Three setups, and the one you pick decides what they see. See Set Up a Transaction Coordinator With the Right Access.

6. Save the View and Take the Count

Whichever mark you chose, the search behind it is worth keeping. Save it as a shortcut, one per coordinator, and the workload check becomes a click down your own menu instead of four searches you rebuild each time.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

> When you need the list rather than the number, download it. SeeTransaction Spreadsheet Downloads.