Agent Assistants

Last Modified on 09/04/2026 11:15 am EDT

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

Introduction

Plenty of the work on a deal isn't done by the agent whose name is on it. A coordinator uploads the paperwork, an assistant keeps the file moving, and both of them need to be able to open the transaction. What neither of them should get is credit for the sale.

That's the gap the assistant tag closes. In Paperless Pipeline, being able to work a transaction comes from being on it, and the way onto a transaction is as an agent on one side of the deal. Left alone, that would fold a coordinator straight into your sales numbers. The tag separates the two ideas: the person keeps the same reach on the file they'd have as an agent, while production and commission stay with the agent who earned them.

The result is that your production figures stay honest and the people who actually move the file keep their hands on it. Because the tag lives on one transaction at a time, the same person can be an assistant on one deal and the agent of record on the next. And nothing about it is a one-way door, so tagging the wrong person is a change you can put right yourself.

How It Works

Tagging an assistant is a two-step move on the transaction: add them like any agent, then mark them as an assistant. The tag is what keeps them out of the sales numbers.

Add First, Then Tag

An assistant starts as an agent on the transaction. You add them on the listing or buying side in the Assign Agents section, then use the [Make Assistant] button to change their role to assistant.

What the Assistant Tag Changes

Users tagged as assistants aren't credited with any sales production or commission for that transaction. Tagged assistants appear in the **Assigned Assistants** area, separate from the agents earning credit on the deal.

Removing the Tag

Removing the assistant tag keeps the person on the transaction as an agent — it only changes whether they're treated as an assistant. To take them off the file entirely, remove them from the Assign Agents section instead.

Tag an Agent as an Assistant

> Flag a user as an assistant on a transaction so they help with the file but aren't credited with the sale.

Who Can Do This: Admins, and agents added to the transaction with permission to edit it.

To tag an agent as an assistant:

1. Open the transaction, then click [Edit Transaction] from the left menu.
2. In the [Assign Agents] section, add the person as a listing or buying agent if they aren't on the transaction yet.
3. Hover over their name and click the [Make Assistant] button that appears on the right.
4. Save the transaction.

The user moves to **Assigned Assistants** and works the file as an assistant — with no sales production or commission credited to them.

Remove the Assistant Tag

Keep a user on the transaction as an agent, but stop treating them as an assistant.

Who Can Do This: Admins, and agents added to the transaction with permission to edit it.

To remove the assistant tag:

1. Open the transaction, then click [Edit Transaction] from the left menu.
2. Hover over the person's name and click the [Assistant] button that appears.
3. Save the transaction.

The person stays on the transaction as an agent, but is no longer considered an assistant.

Agent Assistants FAQ

An assistant helps with a transaction without being credited for the sale. Answers to the common questions about who can be an assistant, commission credit, and removing the tag. See Agent Assistants FAQ.