Assign Agents FAQ

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Assigning agents attaches in-house people to the listing or buying side of a transaction. Answers to the common questions about who can assign agents, why an agent isn't in the list, and adding an agent once the deal is underway.

Who can assign agents to a transaction?

Admins, and agents added to the transaction who can edit it.If an agent can't see the Assign Agents section, they either aren't on the transaction yet or don't have permission to edit it — an admin can make the change.

What's the difference between the Listing and Buying box?

Listing puts the agent on the seller's side; Buying puts them on the buyer's side. If your office represents both sides in-house, you can assign agents to each side on the same transaction.

An agent isn't in the list when I try to assign them. Why?

They need to be an active user in your account first. Only active users appear in the Assign Agents list — so a new hire, or an agent who recently rejoined, has to be added or reactivated under Manage Users before they'll show up.

Why can't a buyer's agent upload documents to a transaction?

They likely haven't been assigned to it yet. An agent can only open and upload to a transaction once they're on it, so add them in the Assign Agents section and they'll be able to work the file.

Can I add an agent after the transaction is already created?

Yes. Open the transaction, click [Edit Transaction], and add them in the Assign Agents section. If a field is locked and you can't make the change, ask your admin to do it.

Learn More

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

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.