Assign Agents

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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.

Introduction

Assigning agents is how you attach the in-house people working a deal to the transaction itself. You pick who's on the listing side, who's on the buying side, and Pipeline ties the file to them — so it shows up in their transaction list, they can upload documents, and the deal is credited to the right agent for production and commissions.

You assign agents in the Assign Agents section, which appears while you're adding a transaction and again any time you edit one. An agent has to be an active user in your account before you can assign them.

How It Works

The Assign Agents section lives on the transaction. You search for an agent, check the side they're on, and they're attached — with their contact card just a hover away once they're on the file.

The Assign Agents Section

When you add or edit a transaction, scroll to **Assign Agents**. Search for an agent by name or find them in the list, then check the box for the side they're on. Everyone you've assigned appears under **Assigned Agents** on the right.

Listing Side or Buying Side

Each agent gets a **Listing** or **Buying** box. Check Listing for the agent representing the seller, and Buying for the agent representing the buyer. If your office runs a deal in-house on both sides, you can assign agents to each side on the same transaction.

Agent Contact Cards (vCards)

Once an agent is on the transaction, their name shows under the *More Info* area of the file. Hover over the name and a vCard icon appears, so anyone on the deal can download the agent's contact details straight into their address book.

Assign Agents to a Transaction

> Add in-house agents to a transaction from the Assign Agents section while editing the file.

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

To assign agents to a transaction:

1. Open the transaction, then click [Edit Transaction] from the left menu.
2. Scroll to the [Assign Agents] section.
3. Search for the agent by name, or find them in the list.
4. Check the [Listing] box if they represent the seller, or the [Buying] box if they represent the buyer. Their name moves to **Assigned Agents** on the right.
5. Repeat for any other agents on the deal.
6. Save the transaction.

Each assigned agent now sees the transaction in their list and can open it, upload documents, and work their side of the deal.

Download an Agent's vCard

> Pull an assigned agent's contact details into your address book from the transaction.

> **Who Can Do This**: Anyone with access to the transaction.

To download an agent's vCard:

1. Open the transaction and find the agent's name under the *More Info* area.
2. Hover over the agent's name until the vCard icon appears to the right.
3. Click the [Download vCard] icon.

The vCard (.vcf) file downloads to your device, ready to import into your contacts or email app.

When the Agent Isn't in the List

The list only offers people who are already active users in your account, so a name that won't come up is almost always someone nobody has set up yet rather than a fault in the transaction.

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

Assign Agents FAQ

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 after the deal is underway. See Assign Agents FAQ.