Outside (Co-op) Agents

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Record the agent from the other brokerage for reference, without giving them any access to your transaction.

Introduction

On a co-op deal, half the people you have to reach don't work for you. The agent at the other brokerage is someone your team calls all month, and their number shouldn't live in one person's phone.

Paperless Pipeline keeps a place for them on the transaction itself, next to the agents from your own office. You record the outside agent against the side of the deal they represent, and their details sit with the file for anyone on your side who needs them. It's a deliberately small record. Pipeline is built for the people inside your account, and the agent across the table isn't one of them, so what gets stored is contact information rather than a seat in the account.

The coordinator who picks the file up months later finds the other side's number on the deal rather than having to ask around for it. And saving one changes nothing outside your account: the agent you record isn't notified and doesn't gain a way in.

How It Works

You add an outside agent from the same Assign Agents section where you add your own agents — you just flip on the co-op option and enter their details.

Turning On Outside Agents

While adding or editing a transaction, check the box for **This transaction has outside (co-op) agents**. That opens fields for the outside agent's information.

Listing Side or Buying Side

You record an **Outside Listing Agent** or an **Outside Buying Agent**, depending on which side of the deal the other brokerage is on. For each, you can enter their Name / Info, Email, and Phone.

Reference Only

Outside (co-op) agents are stored for reference and don't have access to the transaction. Recording them doesn't send them anything or let them into your account — it just keeps the other side's contact details on the file.

Add an Outside (Co-op) Agent

Record the other brokerage's agent on a transaction from the Assign Agents section.

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

To add an outside (co-op) agent:

1. Open the transaction, then click [Edit Transaction] from the left menu.

2. In the [Assign Agents] section, check the box for [This transaction has outside (co-op) agents].

3. Enter the [Outside Listing Agent] or [Outside Buying Agent]'s Name / Info, Email, and Phone, depending on which side they're on.

4. Save the transaction.

The outside agent's details are now stored on the transaction for reference. If a field is locked and you can't make the change, ask your admin to add the outside agent for you.

Outside (Co-op) Agents FAQ

Outside (co-op) agents capture the other brokerage's contact details for reference only. Answers to the common questions about access, adding them later, and which side to use. See Outside (Co-op) Agents FAQ.