Pull a List of the Co-op Agents You've Worked With

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

Every deal you've done had an agent on the other side. Their names, emails, and phone numbers are already in Pipeline — just not where most people go looking.

Introduction

This is the job where the obvious route fails quietly. The contacts download feels like the right place for a list of agents, and it comes back without any of them, because a co-op agent recorded the normal way isn't a Contact. They're a field on the transaction.

The transaction spreadsheet is where they surface, one row per deal, with the other side's agent details sitting together in their own block of columns. Sort that block and you have your list.

When to Use This

- You want to reach out to the agents you've closed deals with over the past few years.
- Your broker is recruiting and wants a list of everyone your office has worked opposite.
- An audit wants co-op broker contact details alongside each transaction.
- You downloaded all contacts and none of the outside agents were in it.
- You need the co-op agents' brokerages, not just their names.

1. Know Where Co-op Agents Actually Live

A co-op agent is recorded on the transaction itself, in the outside agent fields, and that's deliberate — they aren't part of your office and they don't get a Pipeline account. It also means they sit outside the Contacts system entirely.

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

See Outside (Co-op) Agents

2. Download the Transactions You Want to Cover

Decide the scope first — every transaction you've ever had, one year, one agent's deals, one office — because the download follows whatever list you've built. Search first, then download the results; or take the full spreadsheet if you want everything.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

One click gives you every transaction your account has ever had, with every column, in a single file.

See Full Spreadsheet

3. Read the Co-op Block

The outside agent details sit together in one run of columns — roughly X through AC — carrying the co-op listing agent and the co-op selling agent, each with name, email, and phone.

Sort on the name column and duplicates group themselves, which is what turns a list of transactions into a list of people. One pass to de-duplicate and you have every agent you've worked opposite, with a way to reach them.

> The block only has content where somebody filled the outside agent fields in. If half your rows are blank, that's a data-entry habit to fix going forward rather than a limit of the export — a checklist task on transaction creation is the usual remedy.

4. Add Them as Contacts When You Need Company Names

One thing the co-op block doesn't carry is the agent's brokerage. If the company name matters — and for recruiting it usually does — the co-op agent has to be added as a Contact as well, with their company filled in.

That's double entry, and it's worth doing only for the deals you actually want in an outreach list. Once they're Contacts, a master admin can download all contacts and sort by role to pull the listing and buying agents out together.

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

A Contact Role says what someone does on the transaction — buyer, lender, escrow officer, attorney. Type a new one once and Pipeline offers it back to you the next time.

See Contact Roles

Every contact your office has ever added to a transaction, in one spreadsheet you can sort, share, or load into another tool.

See Contact Export