Run a Deal With Agents From Two Different Offices

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One agent from the north office, one from the south, one deal. You don't need to enter it twice — you need to decide where it lives and then hand out one permission.

Introduction

A transaction belongs to exactly one Location. There's no hybrid, no shared, no both. That turns out to be a feature rather than a limitation, because it means there's always one clear answer to who owns the file and whose reports it lands in.

What people expect to have to do is create the deal in each office and keep the two copies in step. Don't. Assigning the second office's agent to the one transaction gives them everything they need, and the only thing that trips it up is permissions, which follow the transaction's Location rather than the person's.

When to Use This

- Your listing agent is in one office and the buyer's agent is in another, and both are yours.
- An agent from your other branch can't upload documents to a transaction they're assigned to.
- You're about to enter the same deal in two Locations to keep both offices happy.
- The other office's broker wants visibility on the deal and you don't want to hand them admin rights to your whole office.
- A cross-office deal is missing from one office's reports.

Why This Beats Entering It Twice

The instinct is that a deal touching two offices should exist in both. It's the expensive answer: two transactions consuming two slots of your monthly quota, two sets of documents to keep in step, two checklists, and a permanent risk that someone updates one and not the other. When you reconcile the numbers at year end, the deal counts twice.

One transaction with both agents on it gives everyone the access they need and keeps a single source of truth. The only thing it doesn't do is appear in two offices' reports — and that's worth trading away in almost every case.

1. Decide Which Location the Deal Belongs To

Usually it's obvious: the listing office, or the office that opened the file. Pick it deliberately, because this decision drives everything after it — who administers the transaction, whose reports it counts in, and which Location's permissions govern it.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

2. Assign Both Agents to the One Transaction

Put the listing agent on the listing side and the selling agent on the selling side, regardless of which office each of them belongs to. Pipeline credits each of them correctly and works out the transaction's side from the assignment.

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]

Pipeline figures out whether you're on the listing side, the buying side, or both — automatically.

See [Transaction Sides]

3. Give the Visiting Agent Permissions in That Location

Here's the piece that catches people. Being on a transaction lets an agent open it; what they can *do* there comes from the permissions they hold in that transaction's Location, not the one they normally work in. So a perfectly well-assigned agent from your other branch can find themselves unable to upload a document.

The fix is on their profile: you grant permissions per location, and one person can hold them in several. Give them what they need in the transaction's Location — usually upload rights — and it holds for every cross-office deal after this one, not just this one.

Decide exactly what each person can see and do in Pipeline, location by location.

See [User Permissions]

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See [Transaction Access]

> This is also the reason the other office's broker doesn't quietly gain access to your files. Granting one of their agents a permission in your Location is a narrow, specific grant; it doesn't promote their principal broker to an admin of your office. See [Give a Branch Manager Access to Only Their Office] for scoping a manager to their own office.

4. Accept That Reports Follow the Transaction

A transaction appears in the reports for its own Location and no other. There's no setting that makes a cross-office deal count in both offices' numbers, and knowing that up front prevents an awkward conversation at year end.

Individual agents are fine either way — an agent's own production follows the agent across every location they work in, so the visiting agent's numbers include this deal wherever it was filed.

5. Enter It Twice Only if Both Offices Must Report It

There's exactly one situation that justifies two transactions: both offices are separately accountable for the deal and both sets of numbers have to include it. If that's genuinely your case, enter it as two transactions — one per Location, each with its own side — and go in knowing it costs two transactions against your plan and creates two files to maintain.

For most offices, one transaction and a permission grant is the right answer.

Add a Location to give an office, team, or group its own users, transactions, and permissions.

See Adding a Location