Swap an Agent's Assistant Across Every File They're On

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An agent's assistant changed, and thirty active files still name the old one. There's a quick way to work the stack yourself, and a point where it's worth handing over.

Introduction

The assistant tag lives on the transaction, not on the agent. That's what makes it flexible: an assistant can help on some of an agent's deals and not others. It's also why changing an assistant is never one edit. Nothing back-fills onto the files that already exist, and nothing applies itself to the files created next week.

So this is a sweep. Below a few dozen transactions it's a pleasant twenty minutes with browser tabs. Above that, our Tech Team will do the whole book at once.

When to Use This

- One assistant left and another took over the same agent's files.
- You hired an assistant for an agent who already has a year of transactions in Pipeline.
- You set the assistant and expected it to apply to their existing deals, and it didn't.
- An assistant needs to reach the agent's closed files, not just the live ones.
- You need an assistant taken off every file they were on, and you're looking for the bulk option.

1. Know Why Nothing Back-Filled

Worth settling before you start, because it changes what you go looking for. There is no account-level setting that says "Ana assists Dana" — the relationship is recorded per transaction, each time. That's deliberate: it lets one person assist two agents on different deals without their names getting tangled.

The consequence is that both directions are manual. Past transactions keep the old assistant until you change them, and new transactions arrive with none until someone adds one.

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants

2. List Every Transaction the Agent Is On

Search by agent and you get the whole set — active, pending, and closed together, which matters here because assistants usually need the closed ones too.

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Global Search

3. Work the Stack in Browser Tabs

This is the trick that makes the manual route bearable. From your results, right-click each transaction name and open it in a new tab. Ten or fifteen tabs at a time, then move along the row making the same edit in each — no going back to the list, no losing your place.

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

4. Hand It Over When the Count Is Real

At a few hundred transactions, stop. Our Tech Team will add or swap an assistant across every one of an agent's transactions — active and closed — as a paid manual service. What they need is a written authorization from an admin and a rule stated plainly, along the lines of *add Ana Reyes as assistant on all transactions where Dana Cole is an assigned agent*. Support will confirm the fee before anything is charged.

> Bulk *removal* isn't offered. Adding and swapping can be done in bulk; taking an assistant off a set of transactions is still one at a time. If you're replacing someone, ask for the swap rather than a removal followed by an add.

5. Check That the Older Files Are Actually Reachable

An assistant added to a closed transaction can open it — but they won't see it on their default Transactions list, which shows active, listing, and pending deals only. That looks like the change didn't work, and it's the support ticket that follows this job more than any other.

Show them where the rest is: the option to view all transactions at the top of the list, or a search, brings the closed files back into view.

The Transactions page lists every transaction you have access to — shaped by the columns you pick, the order you sort, and the scope you set.

See Transactions List

> Setting an assistant up for the first time — permissions, what they can and can't see — is its own job. See Give an Assistant Access to Just That Agent's Files.