Work With the Agent on the Other Side of the Deal

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The agent across the table needs documents, sends documents, and shouldn't have a login. Here's the shape that keeps them in the loop and your audit trail clean.

Introduction

Most deals have an agent from another brokerage on them, and Pipeline has a specific, small place for that person: a field on the transaction. Not a user account, and not a Contact — a co-op agent slot that exists precisely so you can record who they are without giving them anything.

From there, working with them is ordinary email, sent from the transaction so the record stays with the deal. The one thing to get right is what comes back the other way, because the tempting shortcut there quietly ruins your audit trail.

When to Use This

- Your listing sold to a buyer represented by another brokerage.
- The other side's agent is asking for documents and you're wondering whether to add them as a user.
- You want their replies to land on the transaction automatically and are eyeing your maildrop address.
- You've been entering the same outside agent as both a co-op agent and a contact.
- You need the other agent's details on the file for the closing package or an audit.

1. Check That They're Actually Outside

Your office has the listing and one of your own agents brings the buyer. One transaction holds the whole deal — and permissions keep each side out of the other's paperwork.

See Manage Both Sides of a Sale in a Single Transaction

2. Record Them as an Outside Co-op Agent

Below where you assign your own agents, there's a box to tick saying the transaction has outside agents, and a single field for who they are. Put their name and how to reach them in it — most offices write the name, then the phone and email on the same line.

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

See Outside (Co-op) Agents

> Recording them here rather than as a Contact is the whole point — one entry, in the place your transaction spreadsheet already reports from. Adding them as a Contact too is double entry, and worth doing only when you specifically need their brokerage name in an export.

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

3. Send Them Documents From the Transaction

Everything you send them goes out of the transaction's message area, which means the send is logged on the deal — what went, to whom, when. That record is worth more than the convenience, and it costs nothing.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

4. Capture What They Send Back

When their signed addendum arrives in your inbox, forward it to your own maildrop address. It lands in Pipeline attributed to you — which is correct, because you're the one who put it there — and the email that carried it is kept with the transaction.

Email your documents to a maildrop address and Pipeline pulls the attachments in — no logging in, no uploading.

See Maildrop

Forward an email into a transaction and it stays there — the subject, the message, and a record of what came attached.

See Received Emails

5. Never Give Them Your Maildrop Address

The shortcut is obvious and it's a trap: hand the other agent your maildrop address, or BCC it on your message to them, and their documents will attach themselves without you lifting a finger.

They'll also be credited to you. Pipeline identifies the sender by which maildrop address the mail arrived at, so every document the outside agent sends shows up in the history as having come from you — in the transaction record, in the download, in whatever an auditor eventually reads. The extra forward in the previous step is what keeps the trail true.

> Same rule for anyone outside your brokerage — title, escrow, lenders, clients. Maildrop addresses are personal, one per user, and sharing one breaks the attribution it exists to provide.

> If the other side needs the whole file rather than a few documents, that's a bigger job with its own options. See Share a Transaction With Someone Who Isn't a Pipeline User.