Get an Agent's Files Offline Before They Leave

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There's no one-click export of an agent's deals. There is a dependable way to get every one of them, and it starts before their last day.

Introduction

An agent is moving to another brokerage. They want copies of their closed deals: the contracts, the disclosures, the signed addenda. They'd like them in hand before they go.

Here's the plain answer to the question everyone asks first: no, there's no button that hands over all 35 closed files at once. You work through them one transaction at a time. Agents also can't use the full transaction download, because that file carries every piece of a transaction's data, including records an agent was never given permission to see — so it stays an admin tool. What agents do have is a self-service path that pulls every document out of a transaction in one action, no admin required.

None of this puts the brokerage's records at risk. The transactions stay in the account exactly as they are and the agent takes copies. The one thing that really matters is timing: once the profile is deactivated, the agent can't reach any of it. Do this while they still have access.

When to Use This

- You're an agent leaving a brokerage and you want your files before your access ends.
- You're an admin gathering a departing agent's files on their behalf.
- An agent needs their documents out of Pipeline and doesn't have admin access.
- Someone is closing out their time at your office and asked what they can take.

> This article is about getting copies *out*. If you're the brokerage handling the departure itself — keeping the files, reassigning the deals, and turning off the profile — see Offboard a Departing Agent Without Losing Their Files.

1. Start Before the Agent Loses Access

Deactivation is the deadline. The moment the agent's profile is turned off, they can't open a transaction, can't email themselves a document, and can't retrieve anything on their own — every path below closes at once.

So sequence it deliberately: collect the files first, deactivate second. If the profile is already off and files are still needed, an admin can pull them, but the agent no longer can.

Turn off a user's access when they leave — without losing any of the work tied to their name.

See User Deactivation

2. List the Transactions the Agent Needs

Filter the *Transactions* page by the agent's name to see every deal tied to them, then narrow by status or close date if only some years matter. Work from that list — it's easy to miss a closed deal from three years ago when you're going from memory.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

3. Decide Who Pulls the Files

Two paths, and the right one depends on what's actually needed.

If the agent wants their **documents** — which is what most departing agents mean — they can do it themselves, and should. That's the zip-file method below, and it needs no admin involvement at all.

If someone needs the **complete transaction record** — activity history, notes, checklists, and all — that's an admin download, and it comes with a caveat worth reading before you promise it. Skip to **Get the Full Records From an Admin** below.

4. Email the Docs From Each Transaction as a Zip File Link

This is the agent's own path, and it's the one that works. From inside a transaction, the agent attaches the documents to a message and sends it to their own address as a zip file link — every document in that transaction, in one email, without merging anything.

To email a transaction's documents to yourself:

1. Open the transaction.
2. Start a message from within the transaction.
3. Attach the documents you want to keep. Only the documents you select are included, so leave behind anything you don't need.
4. Select the option to **Send docs as zip file link**.
5. Send the message to your own email address.
6. Open the email and click the link to download the zip.

Repeat for each transaction on your list. There's no way to batch it — one transaction, one email — but it's quick once you have the rhythm, and 35 files is an afternoon, not a project.

Download each zip promptly. The zip is built at the moment someone clicks the link, using whatever documents are in the transaction right then. A document removed before you click won't be in it, and a link clicked after deactivation won't help you at all.

5. Attach the Coversheet to Keep the Contacts

Documents are only half of what agents miss later. The client names, phone numbers, and email addresses on a deal live in the transaction's contacts, and they don't travel inside the document zip.

Attach the transaction's coversheet to the same message and they will. The coversheet carries the transaction's details and its contacts, so one extra attachment per transaction saves reconstructing a client list from memory later.

Choose which details lead your company's coversheet and which fields appear on it at all.

See Coversheet Layout

6. Get the Full Records From an Admin

When the complete transaction is genuinely needed, an admin can download it on demand — the whole file, including the activity history the zip method doesn't carry.

Read this part before handing one over: a full download contains everything on the transaction, including commission figures, internal notes, and admin-only records the agent was never meant to see. Review each download and remove anything the agent shouldn't receive before you pass it along.

Volume changes the answer too. Individual downloads are capped per day, so a long list will stall. For a large number of transactions, pulling the agent's folders out of the account's monthly backups is faster than downloading them one by one — same scrub rule applies, since a backup carries everything.

Download a single closed transaction and hand it off to an agent — no waiting for the monthly backup.

See Individual Transaction Downloads

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups