Set Agents Up to Do More on Their Own

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Let agents get the checklist, the due date, the status, the closing package, and their own numbers without asking you, and keep in your hands only the calls an admin should make.

Introduction

A lot of an admin's day is answering agents. Can you add the checklist to my new listing. Can you push the inspection date. Can you mark it closed. Can you send me my docs from the deal that closed in March. What did I make last quarter. None of those takes long, and together they take the morning.

Most of them are a checkbox you set once. A checklist template can put itself on a transaction. A single task can let agents move its date while the rest of the checklist stays yours. One company setting decides whether agents can close their own deals. The rest are habits you teach once: sending a zip link instead of asking for a download, running the commissions report from their own profile.

The same controls also run the other way. The permission that lets an agent file a document is the same one you withhold when you want an admin to see every document first. Enabling agents and gating them are one set of switches, and the work is deciding which way each one points for your office.

When to Use This

- An agent wants to set their own contingency dates and you don't want to hand them the whole checklist.
- Docs an agent uploads land straight on the transaction, and you'd rather an admin saw them first.
- Agents ask you to close or terminate their own deals and you're deciding whether to let them.
- An agent who is leaving wants a copy of their files, and you know downloads are admin-only.
- Every month, agents email you for their commission totals.

1. Start With the Four Permissions Every Agent Needs

Everything else sits on top of the per-user permissions. Four make a working agent: **Create transactions**, **Upload documents**, **Assign docs to transactions**, and **Assign checklist templates to transactions**. Add **Change transaction status** when it fits how your office works. Each one is a checkbox on the person's profile, granted per location, so an agent fully set up in one office starts from nothing in the next. Keep **View all transactions for this location**, **Review docs**, and **Delete any docs in this location** with admin staff. The first of those is what turns a user into a location admin.

Agents see and manage their own work: their transactions, their documents, their checklists, and nothing they don't need.

See Agents

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

See User Permissions

2. Let the Checklist Arrive Before Anyone Asks for It

An auto-apply rule on a checklist template puts the checklist on a transaction the moment the deal matches, so the agent starts on the tasks without waiting for an admin to add them. A rule watches three things: the transaction's status (one named status, or a whole category), the side your office represents, and its label. Set more than one and all of them have to be true at the same moment. Two things to know before you lean on it. A rule fires every time a deal matches, so a transaction that falls through and comes back to Active picks up the checklist a second time. And a rule only looks forward, so the files already open get their checklist by hand.

To set a checklist to apply itself:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings], then [Checklists].
2. Click the template.
3. Check [Automatically apply this checklist to transactions].
4. Choose the Status it should wait for. Narrow it by Side or Label if you want to. A rule needs a status or a label.
5. Click [Save Template].

From now on, every transaction that meets the rule gets the checklist on its own, with any relative due dates already worked out. When several checklists land on one deal they sort alphabetically, so prefix the template names A - , B - , C - to hold them in the order your team works them.

Set a checklist template to add itself to a transaction the moment that transaction's status, side, or label matches the rule you choose.

See Checklist Auto-Apply Rules

3. Open One Due Date at a Time to Agents

By default, changing a task's due date takes the **Fully manage checklists and templates** permission, which is admin work. You don't have to choose between that and nothing. On the checklist template, each task carries its own setting that lets agents change that one task's due date, and nothing else about the checklist. Turn it on for the dates an agent actually knows, the inspection or a contingency deadline, and leave it off for compliance items. On their own transaction the agent then clicks the task's calendar icon and sets a fixed date or a rule counted from a transaction date, the same two choices you have. On every other task the calendar isn't theirs to change. If agents are moving dates you'd rather they didn't, the template is where to look.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it back off is how you quiet a task you no longer need.

See Task Due Dates

4. Put Each Agent's Deadlines on Their Own Calendar

An agent who lives in Google Calendar or Outlook won't open the Tasks page to see what's due, so bring the dates to them with a calendar feed of their own, set up as shown in Get Your Pipeline Deadlines Onto Your Own Calendar.

See your Pipeline task due dates right inside the calendar you already live in — Google, Apple, Outlook, or any app that takes a subscription link.

See Calendar Syncing

5. Read an Agent's Check and Not Applicable Mark as Messages to You

When an agent checks a task it becomes agent-checked. It leaves the agent's Tasks page and daily reminder and stays on yours until you verify the work and check it off, and the Tasks page filter [Agent Checked] is the morning's approvals list. A task that doesn't fit the deal is Shift + click, then [Not Applicable]. From an agent that mark is a note to you, and the task stays in the checklist's count until you check it off or delete it. Both moves, with the one thing people miss about each, are in Use the Features People Write In to Ask About.

When an agent checks off their own task, Pipeline flags it as agent-checked — done on the agent's end, waiting on an admin's approval.

See Agent Checked Tasks

Some tasks on a checklist just don't apply to a given deal — mark them Not Applicable to set them aside without pretending they're done.

See Not Applicable Tasks

6. Decide Whether Agents Can Close Their Own Deals

Whether agents can close, terminate, and expire their own deals is one company-wide setting that only a master admin turns on, and Decide What Agents Can Change on Their Own Deals shows how to set it.

Permissions decide what someone can do to a transaction: create it, edit its fields, change its status, or delete it. You set them per user, per location.

See Transaction Permissions

7. Use the Assign Permission as Your Review Gate

Every doc that reaches a transaction was put there by someone with **Assign docs to transactions**. That is the whole gate. Give an agent **Upload documents** and hold back the assign permission, and everything they add waits in *Unassigned* until an admin files it, with a name and a permission category. It doesn't matter how the doc came in. Emailed to a maildrop address, or uploaded from inside the transaction with the [Upload Docs] button, the upload succeeds and the doc stops in the queue. There is no account-wide switch for this; it's set per user, per location. In the queue, agents see only the docs they uploaded. The admin working it needs **View all transactions for this location** and **Assign docs to transactions** in each location they cover.

The same checkbox runs the other way. Grant it to agents you trust to file their own paperwork, and their docs go straight onto the transaction under the category they chose. They can still rename or recategorize a doc they uploaded until an admin assigns it or marks it reviewed, and after that only admins can.

To route an agent's docs through an admin:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings], then [Manage Users].

2. Click the agent's name.
3. In the Permissions section for the location, check **Upload documents** and leave **Assign docs to transactions** unchecked.
4. Click [Save Settings].

From then on the agent's docs, however they arrive, sit in *Unassigned* until someone with the assign permission puts them on the transaction. Filing them quickly is its own job: Work the Unassigned Queue Fast.

Permissions decide what a user can do with documents: upload them, assign them, review them, delete them — and the category set on each doc decides who can see it.

See Document Permissions

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

8. Have Agents Forward a Deal's Email to the Transaction

The lender's reply, the title company's confirmation, and the inspector's scheduling note all arrive in an agent's inbox, and the file never sees them. Every transaction shows each person their own maildrop address for that deal, right under its name. Forward a message there and Pipeline keeps the subject and the body on the transaction under [Received Emails], whether or not anything was attached. Whatever the agent forwards is what's kept, so forwarding the whole thread keeps the whole thread.

Show agents two details. Use the transaction's address, not the Unassigned one: the Unassigned address pulls out the attachments and throws the message away. And each agent uses their own address, because Pipeline names the owner of the address as the sender. An agent sees a transaction's address only when they have **Upload documents** permission in that transaction's location, so an agent who can't find it is missing that permission.

Send or forward a message to the transaction it belongs to. Pipeline keeps the message on the file and sends its docs to Unassigned, already pointed at that transaction.

See Your Transaction Maildrop Address

Tell agents about privacy too, because it's what makes them willing to send everything. A received email is visible to the person whose address took it in and to admins. Nobody else sees it, not the other agent on an in-house deal and not a co-agent on the same side. An agent who wants a colleague to read a message copies them on it, or replies from inside Pipeline.

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

See Received Emails

Moving a backlog of forty emails at once, and setting up an automatic forward, are in Get Your Email Correspondence Into the Transaction File.

9. Hand Agents the Templates You Already Wrote

A message template with autofill tags is only yours until you share it. Open it under [My Info], [My Templates], set Share Template to [Share With Everyone], and save. It then appears in the agent's saved template list when they compose on a transaction. It never shows on their own My Templates page, which is why an agent says they can't find it. Sharing takes a master admin or an admin with **View all transactions**, and it grants use rather than ownership: only you can edit, schedule, or delete it. What to do about the templates when the owner leaves is in Share Message Templates and Keep Them When Someone Leaves.

One admin can write a message once and hand it to the whole office. That's what sharing a message template does.

See Shared Templates

10. Give Agents the Recipe for Their Own Shortcuts

A shortcut saves a search, a filter, a sort, or all three from the Transactions, Tasks, or Unreviewed page and sits in the left menu, eight per person. It belongs to the person who saved it. Nobody else sees it, and there is no way to share one or save one into someone else's menu. So instead of building them, write the two or three an agent needs as recipes: which page, which filters, which sort, and what to name it. Then walk them through [Add Shortcut] once. My pendings closing this month is the usual first one, and a Transactions page sorted by close date is the second. The move, and how to rebuild the built-in shortcuts that were retired in February 2024, is in Work Pipeline Like a Power User.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

11. Teach Agents to Send Their Own Closing Package, and Their Own Copy

Downloading a transaction is admin-only. The agent's route to a copy of their docs is the same one they use for the client at closing. On the transaction, open [Note / Email], hold [Shift] and click any doc in a category to attach the whole category, check [Send Docs as Zip File Link], and send it to the client, or to their own address for their records. For the contacts, attach the transaction's coversheet with its contacts included, or drag a contact's email address down from the transaction into the message. The shift-click and zip moves are in Send and Track Email Without Leaving the Transaction, and the template that sends the whole closing package is in Build the Message Templates Your Office Sends Every Week.

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

12. Point Agents at Their Own Commission Numbers

In an account with the Commission Module, agents don't need to ask you for their numbers. Their Your Commissions report downloads as a Summary, a PDF of the period's totals, or as a Detail spreadsheet with more columns, such as the fees and taxes on the deals in that period. One deal's full breakdown is the Agent Commission Statement on the transaction itself. Showing agents both, and what you still send yourself, is in Get Agents Their Own Commission Numbers.

Agents can pull their own commission figures without asking anyone. It sits in your personal profile, labeled Your

Commissions.

See My Commissions Report