Document Permission Categories

Document Permission Categories control who can view each document in a transaction. They're essential for keeping sensitive files secure while still allowing the right people access.

Introduction

Only agents added to a transaction and admins can see documents on a transaction. That's the first layer of document visibility.

The second layer is Document Permission Categories. Permission Categories decide which documents an agent can view on a transaction. Admins always have full access to documents, but agents only see the Permission Categories their role allows.

Choose a Permission Category based on who needs to see the document. This way, sensitive documents stays protected, and agents still have what they need to work.

How It Works

Transaction Access Comes First

Transactions can be viewed by admins and by agents who are assigned to them.
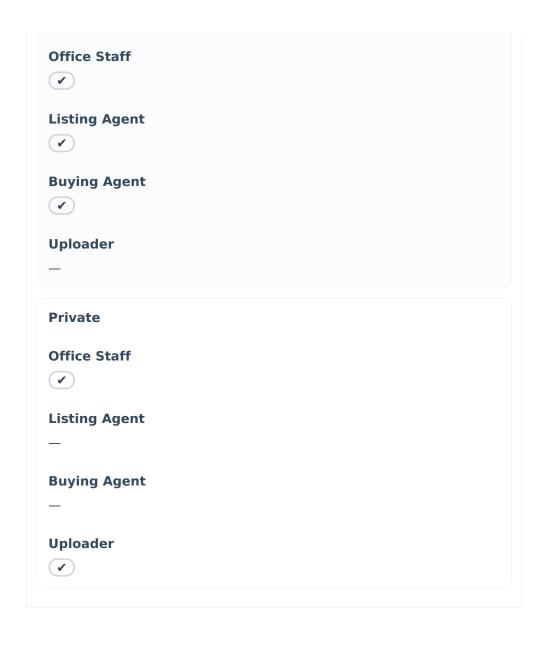
This is the first access checkpoint — if someone isn't in one of these groups, they can't view the transaction or any of its docs.

Document Permission Categories

Once on a transaction, Document Permission Categories control which specific documents each person can see.

Categories & Who Can View Them

Office

Office Staff
✔

Listing Agent
—

Buying Agent
—

Uploader

—

Listing

Office Staff
✓

Listing Agent
✓

Buying Agent
—

Uploader
—

Buyer

Office Staff
✓

Listing Agent
—

Buying Agent
✓

Uploader
—

Sale

Office Staff
✓

Listing Agent
✓

Buying Agent
✓

Uploader
—

Public

Office Staff

✔

Listing Agent

✔

Buying Agent

✔

Uploader

—

Private

Office Staff

✔

Listing Agent

—

Buying Agent

—

Uploader

✔

Who Sees What

Roles & What Categories They Can View

Listing Agents

What They Can See

Listing docs, Sale docs, Public docs, their own Private docs

Buying Agents

What They Can See

Buyer docs, Sale docs, Public docs, their own Private docs

Admins

What They Can See

Everything, including all Private docs

Example

⬚

Standardized Doc Permission Categories

Learn more about Standardized Document Names

Apply Doc Permission Categories

Apply Document Permission Categories

Bulk Change Document Permission Categories