Document Access FAQ

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Seeing a document takes two things: access to the transaction it lives on, and a permission category that includes your role. Answers to the common questions about private docs, office staff, outside parties, and why one agent can see a file another can't.

Can I give someone access to one document without giving them access to the transaction?

No. Transaction access is the gate — there's no permission that opens a single document to someone who can't open the transaction it's on. Add them to the transaction, or give them **View all transactions for this location** if they're admin staff. If they only need the file itself, email it to them instead.

Who can see a document marked Private?

The person who set it to Private, and office staff. Nobody else on the transaction sees it — not the other agent, not the other side. If an admin marks a doc Private, the agent on the transaction won't see it; if an agent marks their own doc Private, that agent and office staff see it. To open it up, change the doc's permission category to one that includes the person who needs it.

Who counts as "office staff"?

Anyone with the **View all transactions for this location** permission. That's the permission behind every reference to office staff or admins in the category list, and it's what makes someone a location admin. A master admin has it in every location automatically.

Can agents see documents in the Office category?

No — Office is office staff only. It's the category for things agents shouldn't see at all. If an agent needs a document that's currently filed under Office, move it to an agent-facing category such as Listing or Sale, keeping in mind who else that category lets in.

Why can the buying agent see my Sale docs when I can't see their Buyer docs?

That's by design. Sale docs are visible to both agents and office staff; Buyer docs are visible only to the buying agent and office staff. The category a doc is filed under decides who sees it — not who uploaded it. If both sides should have a file, put it in Sale or Public.

Does closing a transaction change who can see its documents?

No. Status has no effect on document visibility. If someone could see a file while the deal was active and can't now, look at the doc's permission category or at whether they're still on the transaction.

Can an outside agent or a contact see documents on a transaction?

No. Outside (co-op) agents, attorneys, lenders, and other contacts appear on the transaction but have no login and no document access — no permission category reaches them. When they need a file, email it to them from Pipeline.

Can an agent see unassigned documents someone else uploaded?

No. Agents see only the unassigned docs they uploaded themselves. Admins can see and assign unassigned docs that belong to other people. If a document needs to be assignable by a specific person, it has to arrive through that person's own maildrop address or upload.

Can everyone in my office see documents in the Reference area?

Yes. Every user in the account can view Reference docs, which is what makes that area the right place for blank forms, office policies, and anything company-wide. Anything deal-specific belongs on the transaction, where categories can narrow it.

Learn More

Two things decide who can see a document: whether the person can get to the transaction it lives on, and which permission category the doc was filed under.

See Document Access

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.