Document Access

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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.

Introduction

Someone is standing on a transaction, looking at its list of documents, and one of the files isn't there for them. Nothing is broken and nobody made a mistake.

Access runs in two layers, and both have to line up before a person sees a file. The first is the transaction itself: reaching the deal is the price of entry, and somebody who can't open the transaction never sees any of its documents. The second is the permission category each document was filed under, which narrows that group again to the people that particular file was meant for. Being added to a deal isn't the same thing as being able to read everything on it.

Once you know it's those two layers, almost every "why can't they see this?" resolves to one of them, and both are things your office can change. The place it genuinely stops is outside the account. There's no public link and no way to hand a file to somebody who isn't a user, so a request from a title company, an auditor, or an agent who has moved on runs through whoever holds the account.

How It Works

Access to the Transaction Comes First

A user sees a transaction's documents only if they can see the transaction — as an agent added to it, or with the **View all transactions for this location** permission, which is what "office staff" means in Pipeline and what a master admin holds in every location. No permission grants document access on its own, and a transaction's status doesn't change it. See Transaction Access.

The Permission Category Decides the Rest

Every doc on a transaction carries a category — Office, Listing, Sale, Buyer, Public, or Private — and it's a permission, not a filing label: a doc filed under Buyer is genuinely inaccessible to the listing agent. Moving a file to a category that includes someone is what makes it visible to them, and viewing carries downloading with it.

Who	Sees
Office staff — anyone with **View all transactions for this location**	Every document on the transaction, in every category
The listing agent	Listing, Sale, and Public docs, plus Private docs they filed themselves
The buying agent	Buyer, Sale, and Public docs, plus Private docs they filed themselves
Outside (co-op) agents, attorneys, lenders, and other contacts	Nothing — they have no login, so email them the file from Pipeline instead

Listing docs stay on the listing side, Buyer docs stay on the buying side, and anything both sides should see goes in Sale or Public. See Document Permissions.

Docs That Aren't on a Transaction

An agent sees only the unassigned docs they uploaded themselves, which is why a doc emailed to one person's maildrop address shows up for that person and nobody else; admins see and assign the rest. Reference docs run the other way — every user in the account can view them, which makes Reference the right home for blank forms and office policies and the wrong home for anything deal-specific.

Frequently Asked Questions

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 a doc they uploaded as 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.