Document Access

Last Modified on 09/04/2026 11:09 am EDT

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.

Document Access FAQ

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. See Document Access FAQ.

Document Access Troubleshooting

Running into a problem? Start here.

- Why Can't an Agent See a Document?