Document Permissions FAQ

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You grant document abilities per user and per location, and the six permission categories are a fixed set that can't be edited. Answers to the common questions about uploading, assigning, changing a doc's category, and who can delete a document.

Why doesn't an agent see the upload option on a transaction?

They don't have the **Upload documents** permission in that transaction's location. Upload is granted per location, so an agent who uploads fine on their own office's files loses the option on a transaction that belongs elsewhere. Grant the permission for that location on their profile — or move the transaction to the location where they already have it.

Why do an agent's uploads land in Unassigned instead of letting them pick a category?

They're missing **Assign docs to transactions**. Without it a user can upload but not attach documents to a transaction, so everything stops in Unassigned Docs and there's no permission category to choose. Once you grant it, they can assign their own docs and set a category as they go.

Can I add, rename, or delete a permission category?

No — the six are fixed. They're built to cover every combination of who-sees-what, so there's no permission gap a custom category would fill. When you want to group documents by type rather than by audience — terminations, amendments, addenda — use document labels instead.

Can I limit which permission categories an agent can choose?

Not directly, but there are two good controls. Agents can only pick categories they themselves have access to view, which rules out Office automatically. And you can pre-set a default permission category on each of your standardized document names, so the right category is applied the moment that name is used — which is the reliable fix when agents keep choosing wrong.

Can an agent change a document's permission category after uploading it?

Only on their own docs, and only before the doc is reviewed. An agent can recategorize a doc they assigned, choosing from the categories they can view — until an admin assigns the doc or marks it reviewed, after which only admins can change it. Admins can change the category on any document at any time.

What's the difference between the Sale and Public categories?

Nothing, permission-wise. Both are visible to the listing agent, the buying agent, and office staff. Public exists as a separate label so documents that aren't sale-specific but still belong in front of everyone on the transaction have somewhere natural to sit.

What's the difference between the Buyer and Sale categories?

Buyer is one-sided; Sale is both. Buyer docs are visible to the buying agent and office staff only — that's the category for anything the listing agent shouldn't see. Sale docs are visible to both agents and office staff.

Who can delete a document?

Agents can delete their own docs until those docs are reviewed; everything else needs an admin. An agent fully manages a doc they uploaded right up until an admin assigns it or marks it reviewed. After that, deleting it takes the **Delete any docs in this location** permission, which also covers other people's documents and unassigned docs.

Should agents have the Review docs permission?

No — it's an admin grant. **Review docs** lets someone mark *any* transaction doc in the location as reviewed, which reaches across every agent's files. Give it to admin staff, and pair it with **View all transactions for this location** so they can actually open the transactions whose docs they're reviewing.

Learn More

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

Still Have Questions?

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