Document Permissions

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

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.

Introduction

Most document permission questions start in the same place. Someone on your team can see a document but can't rename it, comment on it, or delete it, and their profile looks like it should let them.

Two separate things are answering at once. The first is the set of abilities granted to a person: what they can upload, assign, sign off on, and remove. Those live on the user, and you grant them one location at a time, so someone can have full run of one office and nothing at all in another. The second is the permission category filed on each individual document, which decides who can open that particular file. They sit in different places because they answer different questions. One is about a person; the other is about a document.

Once you can tell the two apart, the confusing cases stop being confusing. An option someone expected and didn't get is almost never something broken in their account. It's one of these two layers doing exactly what it was set to do, and both are settings rather than fixed facts, so either one can be changed.

How It Works

Five permissions cover what a user can do with documents; six fixed categories cover who can see each one.

What You Can Grant a User

You grant document permissions one location at a time, so the same person can upload in one office and not in another. A master admin holds every one of them, in every location, automatically.

Permission	What it lets someone do	Level
Upload documents	Upload files directly, or email them to a maildrop address. Without it in a location, a user gets no maildrop address there and no upload option on that location's transactions.	Agent
Assign docs to transactions	Assign their own unassigned documents to transactions they can see, and set a permission category while doing it. It also covers breaking apart and merging a doc they assigned. Paired with **View all transactions for this location**, it reaches anyone's unassigned documents and any transaction in the location.	Agent
Review docs	Mark any transaction doc in the location as reviewed. Pair it with **View all transactions for this location** so the reviewer can open the transactions whose docs they're reviewing.	Admin
Mark docs as entered	Mark documents as entered into your accounting system, from the Unreviewed tab.	Admin
Delete any docs in this location	Delete any unassigned doc or transaction doc in the location, including other people's and including reviewed docs.	Admin

> **Good to know**: *Review docs*, *Mark docs as entered*, and *Delete any docs in this location* give an agent reach over every other agent's documents in the location. Keep them with admin staff.

Who Can See Each Doc

Every document added to a transaction carries a permission category. That's how Pipeline knows who can open the file.

Category	Who can view the doc
Office	Office staff only.
Listing	The listing agent and office staff.
Sale	The listing agent, the buying agent, and office staff.
Buyer	The buying agent and office staff.
Public	The listing agent, the buying agent, and office staff. Same reach as Sale, with its own label for docs that belong in front of everyone without being sale-specific.
Private	The person who set the doc to Private, and office staff.

A category narrows an audience rather than creating one: a person needs access to the transaction first. The six are the whole list — you can't rename, add, delete, or narrow one for a particular agent — and together they cover every combination of who-sees-what. Agents are offered only the categories they can view themselves, so a listing agent never sees Buyer or Office.

> Use document labels, not categories, when you want to group documents by *type* — terminations, amendments, conveyancing. Categories are permissions; labels are classification.

When a Doc Stops Being the Agent's to Change

An agent fully manages the docs they uploaded — rename, recategorize, delete — right up until an admin assigns the doc or marks it reviewed. After that those options leave the agent's gear menu and only admins can act on the file. Deleting a reviewed doc takes **Delete any docs in this location**.

Change a Doc's Permission Category

> Move a document into a different category so the right people can see it — for example, from Listing to Sale so both agents on the deal have it.

> **Who Can Do This**: An admin can change the category on any doc. An agent can change it only on docs they assigned, only to a category they have access to view, and only before the doc is marked reviewed.

To change a doc's permission category:

1. Open the transaction and go to its Docs area.

2. Click the [Gear] next to the doc, then select [Edit Doc].

3. Choose the permission category you want.

4. Click [Save].

The doc moves under its new category header in the transaction's doc list, and everyone that category includes can see it right away.

Grant a Document Permission to a User

> Turn a document ability on or off for a user, one location at a time, from their profile.

> **Who Can Do This**: A master admin, or a user with the *Create users and locations* permission.

To grant a document permission to a user:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].

2. Click [Manage Users].

3. Search for the user, then click their name (or click the [Gear] and choose [Edit User]).

4. Scroll to the Permissions section and check or uncheck the document permission for the appropriate location.

5. Click [Save Settings].

The change takes effect right away for that user in the location you set. Are they mid-session? They may need to reload the page to see it.

Stop Agents Landing Docs in the Wrong Category

Since the six can't be trimmed, renamed, or added to, the lever is further back. Settle the category before anyone reaches the dropdown by attaching it to the name of the document itself.

Build a shared list of your company's document names, and every agent names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

Document Permissions FAQ

Document abilities are granted 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. See Document Permissions FAQ.