Why Can't an Agent See a Document?

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When an agent can't see a document that's plainly on the transaction, it's almost always one of two things — they can't see the transaction, or the doc's permission category doesn't include them.

What's Happening

Document visibility in Pipeline is two gates in a row. The first is the transaction: a person has to be able to open it before any of its documents exist for them. The second is the permission category on the individual doc, which decides which of those people see that particular file. A doc can be perfectly visible to you and invisible to the agent standing next to you, and nothing is broken.

Work down the causes below in order. The first two account for most cases.

The Agent Isn't on the Transaction

An agent who hasn't been added to a transaction doesn't see it, or anything on it. There's no way to share a single document with someone who lacks transaction access, and that holds even for Public docs.

To fix it, add the agent to the transaction in their real role — listing or buying agent, or assistant. Don't reach for **View all transactions for this location** to solve one file: that permission makes them an admin for the location and exposes every other agent's transactions and documents along with it.

The Doc's Category Doesn't Include Their Side

Permission categories are one-sided on purpose. Listing docs go to the listing agent and office staff; Buyer docs go to the buying agent and office staff. So a listing agent genuinely cannot see a file filed under Buyer, and the reverse is just as true.

To fix it, change the doc's permission category to **Sale** or **Public**, both of which include the agents on both sides plus office staff. Open the transaction's Docs area, click the [Gear] next to the doc, choose [Edit Doc], set the category, and save.

The Doc Is in the Private Category

Private is the narrowest category there is: only the person who set the doc to Private and office staff can see it. If a transaction coordinator or an admin uploaded a file and left it Private, the agent on the transaction won't see it — and if the agent set it Private themselves, nobody else on the deal will.

To fix it, recategorize the doc to one that includes the person who needs it. Closing the transaction changes nothing here; a Private doc stays private after close.

The Doc Is in the Office Category

Office is the staff-only category. Agents never see Office docs, no matter which side of the transaction they're on. If a document is meant for an agent, it needs to be in Listing, Sale, Buyer, or Public — whichever matches who else should see it.

The Agent Is Listed on the Wrong Side

Sometimes the category is right and the roster is wrong: the person doing the buying side is recorded as the listing agent, so Pipeline correctly hides the Buyer docs from them. The tell is an agent who "used to be able to see" a category and now can't.

To fix it, correct the agent's role on the transaction rather than opening up the doc — the categories resolve on their own once the sides are right.

The Doc Was Merged or Broken Apart

When docs are merged, the resulting file belongs to whoever merged it and comes back in the Private category. That's why an agent can see the original pages and then loses sight of the combined document an admin created from them.

To fix it, set the merged doc's permission category to one the agent has access to — Listing, Sale, or Public.

It's an Unassigned Doc Someone Else Uploaded

Unassigned docs aren't shared. An agent sees only the ones they uploaded themselves, so a file sitting in your Unassigned queue is invisible to them until it's assigned to a transaction they can see. Assign it, give it the right category, and it appears.

The Doc Is Reviewed and They're Trying to Change It

If the agent can see the document but has lost the options to rename, recategorize, or delete it, that's not a visibility problem. Once a doc is marked reviewed — or assigned by an admin — the agent's management options on it go away and only admins can act on it.

Still Can't See It?

If the agent is on the transaction, the doc is in a category that includes their side, and it still doesn't appear, contact us with the agent's login email, the transaction name, and the document name, and we'll look at the specific setup.

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.