Decide Who Can See Commission Numbers

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Document access and money access are two different switches in Pipeline, set on the same page. Once you see them as separate, most of what offices want here turns out to be a checkbox rather than a compromise.

Introduction

Your admin needs to open every file in the office — and shouldn't be reading what each agent takes home. Your bookkeeper needs the opposite: the commission figures and the CDAs, without the run of your account settings. Both requests sound like they need a permission level that doesn't exist, and neither one does.

Pipeline separates *can this person see the transaction* from *can this person see its money*. Grant one without the other and you've built either arrangement. The Financial Info section, the CDA document, the commission fields, and the financial reports all sit behind the money switch, and everything else about a transaction sits behind the document switch.

One thing shapes the whole page, though: those financial permissions only exist on a profile once the Commission Module is turned on. Without it, financial reporting is master-admin-only and there's nothing granular to grant.

When to Use This

- You want an admin to open every transaction without seeing agents' splits or the CDA.
- Your bookkeeper needs commission numbers and you don't want to make them a master admin.
- A sales manager wants production reports and you'd rather not hand over the account.
- An assistant needs one agent's files, and other agents' commission info has to stay invisible.
- You're not sure what your agents can already see about their own money.

Why This Beats Making Them a Master Admin

The fast answer to "she needs to see the CDAs" is to make her a master admin, and it's the one offices reach for because it definitely works. It also hands over billing, the card on file, user management, and every setting in the account — to solve a reporting problem. Once it's done, taking it back is a conversation.

The financial permissions exist precisely so that conversation isn't necessary. A bookkeeper with them sees every number they need and nothing about your account. The trade is that they only appear when the Commission Module is on — which is the real reason so many offices end up with more master admins than they meant to have.

1. Turn On the Commission Module First

If commission permissions aren't on the profiles you're looking at, this is why. Without the Commission Module, the financial section of a user's permissions doesn't exist, financial reports are limited to master admins, and there's no way to give a finance director the Comparative Production report without making them one.

A master admin switches it on from **Admin / Settings** under Add-on Modules, where there's also a trial and a demo if you're weighing it. Once it's on, the financial permissions appear on every profile and everything below becomes available.

2. Give Staff Every File Without the Money

This is the common one: a transaction coordinator or office admin who works every deal in the office and has no business seeing splits.

Grant them **View all transactions for this location (admin-level permission)**, plus whatever they need to actually do the work — upload docs, assign docs, review docs, change transaction status. Then stop. Leave every financial permission unchecked, and leave *Manage users and locations* unchecked too.

They now open every transaction in that Location, and the Financial Info section, the CDA, the commission fields, and the financial reports are not there for them. Not greyed out — absent.

Decide exactly what each person can see and do in Pipeline, location by location.

See User Permissions

> Permissions are per Location, so the reach follows the grant. An admin given View All in one state's Location sees every file there and nothing in the other — which is also what decides where they show up as a staff recipient on emails.

3. Give the Bookkeeper the Money Without the Account

Now the mirror image. Your bookkeeper, controller, or finance director needs commission figures, CDAs, and the reports built on them.

Grant the financial permissions on their profile — the ones covering entering and viewing financial data — and make them an admin in each Location whose numbers they handle. Both halves matter: the financial permission opens the money, and the Location admin permission is what puts them on the transactions the money belongs to.

They can then read the Financial Info section, open CDAs, and run the financial reports for those Locations, while your account settings, billing, and user management stay closed to them.

> Sales managers asking for production reports fall into this group too. The Comparative Production report and its neighbours sit behind the same financial permission — grant it and they run their own numbers instead of asking you for a screenshot each month.

4. Know Where the Switches Stop

Three limits worth knowing before you promise someone a configuration that doesn't exist.

There's no view-only-CDA permission. The permission that lets someone view CDAs is the same one that lets them enter commissions — the two travel together. If you need a person to read CDAs without touching the numbers, email them the CDA document from the transaction instead of changing their permissions.

Fees and deductions are master admin only. Setting up and editing fees and deductions isn't among the grantable permissions. An accountant who has to maintain them needs master admin, and that's the one place in this article where the trade-off is real.

There's no per-document confidentiality setting for money. If a document itself is sensitive, the boundary you have is the Location and the doc's permission category, not a document-level role.

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]

5. Check What Your Agents Already See

Worth confirming, because offices often assume it's looser than it is. Agents — anyone without admin-level permissions — never see the CDA. It's a broker-level document, visible to master admins and to admins holding financial permissions, and that's the whole list.

What agents do get is their own money: an Agent Commission Statement they can download from a transaction, and a *Your Commissions* report in their personal profile covering any date range they choose. They can answer their own production questions without seeing anyone else's.

> Need a harder wall than permissions give you — one assistant who must see a single agent's files and nothing about anyone else's money? Put that agent's transactions in their own Location and grant the assistant View All there only. The boundary becomes structural rather than a set of unchecked boxes.