Give an Assistant Access to Just That Agent's Files

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An agent's assistant needs that agent's files and nothing else. Add them to each transaction and the rest of the office stays invisible.

Introduction

One of your producers has hired help. The assistant works for the agent, not for the brokerage, and the access should say so: this agent's deals, in full, and no window into anyone else's.

Pipeline handles this with the assistant tag. Someone with no admin permissions sees a transaction only when you put them on it, so the agent's files open up one at a time and the office stays shut. The setup itself takes a minute; the parts worth reading are what to do about the deals the agent already has open, and the handful of things an assistant still won't be able to reach.

When to Use This

- One of your agents hired their own assistant and wants them on their files only.
- The assistant should do the paperwork but never show up in your production or commission numbers.
- Your agent's assistant is added but says they can't see the transactions they were hired to work.
- The assistant can see the new deals but none of the ones that were already open when you added them.
- An assistant is on the file and still can't upload a document.

Why This Beats Scoping an Admin to One Agent

The natural request is "make them an admin, but only over Jane's transactions." That role doesn't exist. You grant admin permissions at the location level — the smallest thing you can hand someone admin rights over is a whole office, never a single agent — so there's no box that means what you want it to mean.

The assistant tag is the answer, and it's a better one than the role you were asking for. Access lands per transaction, which is finer than per-agent: the assistant sees exactly the files someone put them on, and the day the agent takes on a deal they'd rather handle alone, they don't add them.

1. Add the Assistant as Their Own User

The assistant needs their own profile before you can put them on anything — the agent's login is not an option here, and every upload the assistant makes should carry their name, not the agent's.

Add the agents and staff on your team so each person can log in and work in Pipeline under their own account.

See Adding a User

2. Leave Their Admin Permissions Unchecked

This is the step that does the containing, and it's a step of restraint — the access you want comes from what you *don't* grant. Leave **View all transactions for this location** clear. That one permission is what would open the whole office to them, and it's the difference between an agent's assistant and an office admin.

Check only what the assistant needs to do their job: **Upload docs** so they can get paperwork in, **Assign docs to transactions** so it files itself correctly, and **Create transactions** if the agent wants them opening new deals. Grant these in the location the agent's transactions live in — a permission checked in the wrong location does nothing.

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

See User Permissions

> Skipping **Upload docs** is the single most common reason a correctly-tagged assistant emails you saying Pipeline won't let them do anything. Being on the transaction gets them in the door; the permission is what lets them work.

3. Tag Them as an Assistant on the Agent's Transactions

Now put them on the files. Add them on the transaction the way you'd add an agent, then mark them as an assistant — that tag is what keeps them out of the sales numbers.

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants

> There's no way to mark someone as a permanent assistant who's added to an agent's deals automatically. The tag is per transaction, every time — so make adding the assistant part of how your office opens a file for that agent.

4. Catch Up the Deals the Agent Already Has Open

Here's the part that surprises people. Tagging an assistant does nothing retroactive. They see the transactions they've been added to and no others, so every deal the agent had open before today stays invisible until someone goes and adds them to it.

If it's a handful of files, do it by hand — search the agent's transactions, then right-click each name from the Transactions list and open it in a new tab. Working through ten open tabs is dramatically faster than opening and closing transactions one at a time.

If it's a full book of business, don't do it by hand. Our Tech Team can bulk-add an assistant across a set of transactions for a flat fee. Email us a rule describing what you want — something like "add Joe Smith as assistant on all transactions where Jane Good is the agent" — along with authorization to charge the card on file, and we'll run it for you.

> Worth deciding deliberately rather than by default: plenty of offices only add the assistant going forward

> and leave the agent's closed and in-flight deals alone. If the assistant doesn't need the history, that's a legitimate answer and it's free.

5. Know What the Assistant Still Can't Reach

An agent-level assistant works inside real walls, and it's better to know them now than to hear about them at 5pm on a closing day.

They can't see the CDA or other financial documents. Those are restricted to master admins and admins holding the Enter Financial Data permission, and an assistant with no admin permissions is neither. If your assistant swears they could see a CDA last month, they almost certainly couldn't.

They can only manage documents they uploaded themselves — and only until a doc is marked Reviewed. An assistant can't break apart, edit, or delete the agent's own uploads. Once a document has been reviewed, even their own uploads are locked to them.

They can't comment on documents somebody else uploaded. That ability rides on View All, which is exactly the permission this setup withholds — so it's a real trade-off of keeping the assistant scoped, not a bug.

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See Transaction Access